

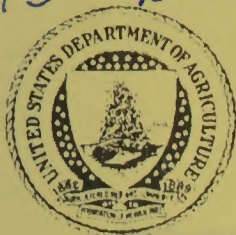
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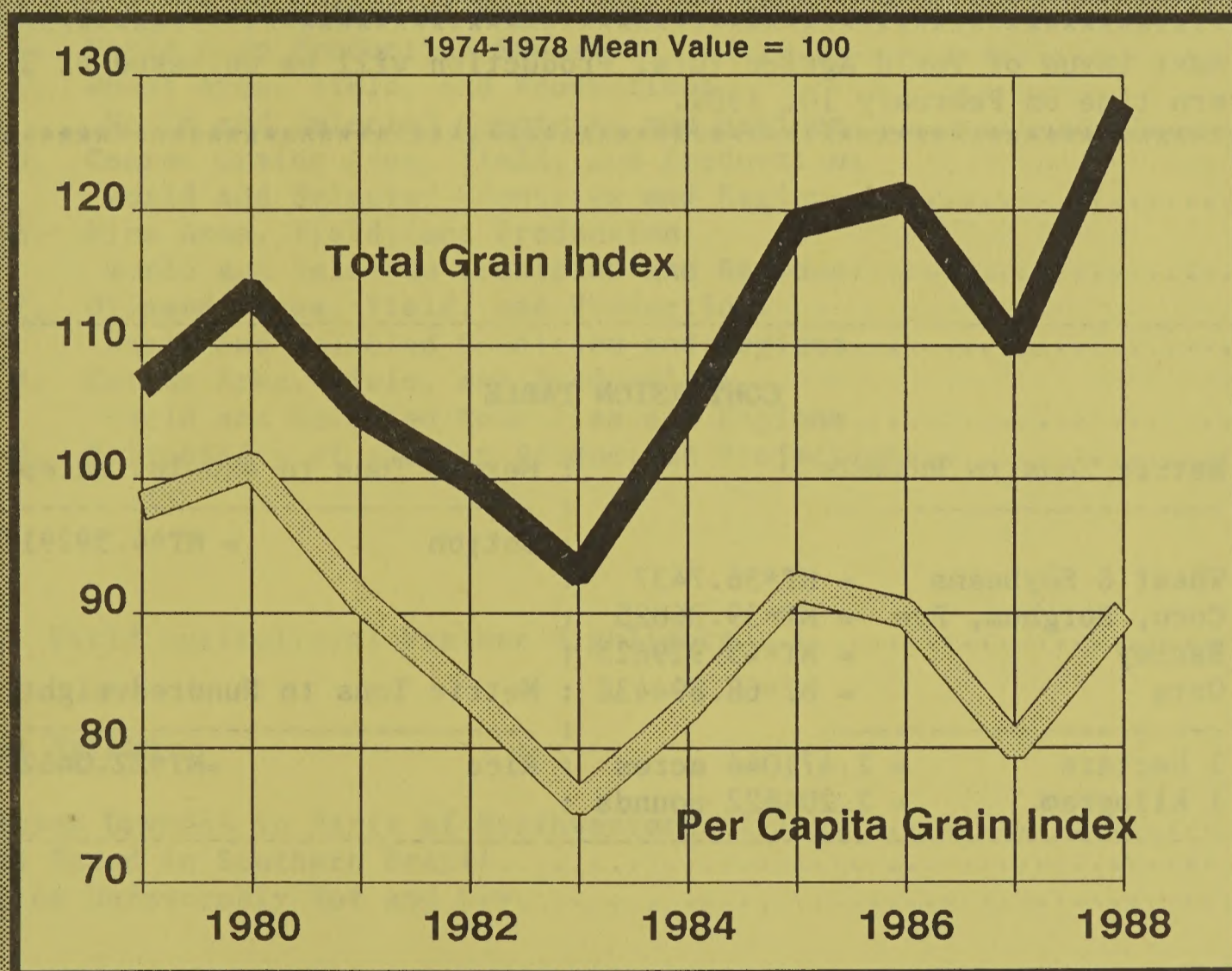
United States  
Department of  
Agriculture

Foreign  
Agricultural  
Service

Circular Series  
WAP 1-89  
JANUARY 1989

# World Agricultural Production

## ALL AFRICA GRAIN PRODUCTION INDICES 1979 - 1988



### Inside This Issue.....

World Coffee Production  
Trends in African Grain Production  
EC Cropland Set-aside Programs  
Decline in Output of Processing Tomatoes

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. All numbers in this report are based on unrounded data and detail may not add to totals because of rounding.

This report was prepared by the Foreign Production Estimates Division (FPED), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888.

\*\*\*\*\*  
 \* The next issue of World Agricultural Production will be released at 3 p.m. \*  
 \* eastern time on February 10, 1989. \*  
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:		:	
:		:	
:		:	
:		:	
:	Metric Tons to Bushels	:	Metric Tons to 480-lb. Bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & Soybeans = MT*36.7437	:	
:	Corn, Sorghum, Rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric Tons to Hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	
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## PRODUCTION HIGHLIGHTS FOR 1988/89

**WHEAT:** World production for 1988/89 is estimated at 503.2 million metric tons, up 0.7 million or less than 1 percent from last month, but down less than 1 percent from last year's harvest. Important changes from a month ago include the following:

- o Australia Production is estimated at 13.8 million tons, up 0.8 million or 6 percent from last month and up 11 percent from last year. Area is estimated higher in Western Australia.

**COARSE GRAINS:** World production for 1988/89 is estimated at million tons, up 10.5 million or 1 percent from last month, but down 9 percent from last year. Important changes from a month ago include the following:

- o United States Production is estimated at 149.6 million tons, up 7.4 million or 5 percent from last month, but down 31 percent from last year. Upward revisions made for oats, barley, sorghum, and corn (+6.3 million tons) more than offset a minor downward change in rye.
- o Sudan Production is forecast at 4.4 million tons, up 1.7 million or 64 percent from last month and up 181 percent from last year. The increase is due primarily to greater estimated sorghum production. Excellent planting incentives and weather conditions resulted in higher area and yield estimates.
- o Brazil Production is forecast at 23.6 million tons, up 1.0 million or 4 percent from last month, but down 6 percent from last year. The increase is due to a higher corn area estimate.
- o Mali Production is forecast at 1.7 million tons, up 0.8 million or 89 percent from last month, and up 31 percent from last year. The increase is due to a revised production series as well as higher area and yield estimates for this year.
- o Ethiopia Production is forecast at 4.2 million tons, up 0.7 million or 19 percent from last month and up 15 percent from last year. The increase is due to higher area and yield as a result of excellent weather conditions throughout the season.
- o Burkina Faso Production is forecast at 1.7 million tons, up 0.5 million or 38 percent from last month and up 36 percent from last year. The increase is due to higher area and yield estimates.

- o Niger Production is forecast at 2.0 million tons, up 0.3 million or 19 percent from last month and up 49 percent from last year. The increase is due to excellent weather conditions this year, resulting in higher area and yield estimates.
- o Argentina Production is estimated at 11.9 million tons, down 0.5 million or 4 percent from last month and down 9 percent from last year. Yield estimates for corn were reduced due to abnormally hot and dry conditions in key production areas.
- o Australia Production is estimated at 6.8 million tons, down 0.4 million or 6 percent from last month, but up marginally from last year. Sorghum area is estimated down due to very poor planting weather.
- o Thailand Production is estimated at 5.1 million tons, down 0.2 million or 4 percent from last month, but up 72 percent from last year's drought-reduced crop. The second season corn crop has been smaller than expected.
- o Other W. Europe Production is estimated at 10.8 million tons, down 0.3 million or 2 percent from last month and down less than 1 percent from last year. Yield estimates were reduced for most coarse grains in Finland.

**RICE (MILLED-BASIS):** World production for 1988/89 is estimated at a record 323.2 million tons, up 2.8 million or less than 1 percent from last month, and up 5 percent from the 1987/88 crop. Foreign production in 1988/89 is estimated at a record 318.1 million tons, an increase of 13.2 million or 4 percent from 1987/88.

- o India Production is estimated at 65.0 million tons, up 2.0 million or 3 percent from last month and up 23 percent from last year. Kharif season production was at or near record levels in most producing states. A very strong rabi season rice crop is expected in the spring.
- o Vietnam Production is estimated at 10.6 million tons, up 0.6 million or 6 percent from last month and up 7 percent from last year. Higher yields are estimated.

- o South Korea Production is estimated at 6.1 million tons, up 0.2 million or 4 percent from last month and up 10 percent from last year. The upward adjustment is based on official statistics from the Ministry of Agriculture, Forestry and Fisheries. High yields are expected due to excellent weather during the growing season.

**OILSEEDS:** World production for 1988/89 is forecast at 200.5 million tons, down less than 1 percent from last month, and down 6.0 million or 3 percent from last year's record output. U.S. production is forecast at 50.0 million tons, up 0.8 million or 2 percent from last month, but down 18 percent from last year. Foreign production is forecast at a record 150.5 million tons, down 1.5 million or 1 percent from last month, but up 4.6 million or 3 percent from last year.

- \* **Soybeans:** World production for 1988/89 is forecast at 95.0 million tons, up less than 1 percent from last month, but down 7.9 million or 8 percent from last year. Significant changes from last month include the following:

- o United States Production is estimated at 41.9 million tons, up 0.7 million or 2 percent from last month, but down 10.5 million or 20 percent from last year. Both area and yield estimates were revised upward this month.

- \* **Cottonseed:** World production for 1988/89 is forecast at 32.1 million tons, down 0.3 million or 1 percent from last month, but up 1.1 million or 4 percent from last year. Significant changes from last month include the following:

- o United States Production is estimated at 5.5 million tons, up 0.1 million or 2 percent from last month and up 5 percent from last year. The increase reflects higher estimated cotton area.

- o China Production is estimated at 6.9 million tons, down 0.3 million or 4 percent from last month and last year. The reduction is based on a drop in estimated cotton production by the State Statistical Bureau.

- \* **Peanuts:** World production for 1988/89 is forecast at 21.9 million tons, down 0.1 million or less than 1 percent from last month, but up 2.2 million or 11 percent from last year. Significant changes from last month include the following:
  - o **United States** Production is estimated at 1.8 million tons, down 50,000 tons or 3 percent from last month due to reductions in area and yield estimates.
  - o **Senegal** Production is estimated at 740,000 tons, down 8 percent from last month due to lower than expected yields.
- \* **Sunflowerseed:** World production for 1988/89 is forecast at 21.3 million tons, up marginally from last month and up 4 percent from last year. Significant changes from last month include the following:
  - o **United States** Production is estimated at 0.7 million tons, up 0.1 million or 16 percent from last month, but down 0.4 million or 38 percent from last year. The area and yield estimates were increased based on crop survey data.
- \* **Rapeseed:** World production for 1988/89 is forecast at 20.8 million tons, down 0.9 million or 4 percent from last month and down 2.1 million or 9 percent from last year. A significant change from last month is:
  - o **China** Production is estimated at 4.7 million tons, down 1 million or 18 percent from last month and down 29 percent from last year. Poor weather this year in the major rapeseed-growing provinces led to sharply lower yields.
- \* **Flaxseed:** World production for 1988/89 is forecast at 1.8 million tons, down 50,000 tons or 3 percent from last month due to a reduction in the estimate for the United States. The world production forecast is down 23 percent from last year.
- \* **Copra:** World production for 1988/89 is forecast at 4.6 million tons, down 0.1 million or 2 percent from last month, but up 0.3 million or 7 percent from last year. The reduction reflects smaller crop prospects for the Philippines.
- \* **Palm Kernels:** World production for 1988/89 is forecast at 2.9 million tons, unchanged from last month, but up 0.2 million or 8 percent from last year.
- \* **Palm Oil:** World production for 1988/89 is forecast at 9.3 million tons, unchanged from last month, but up 0.7 million or 9 percent from last year.

**COTTON:** World production for 1988/89 is estimated at 83.8 million bales, down 0.6 million bales or less than 1 percent from last month, but up 4 percent from 1987/88. Foreign production is estimated at 68.3 million bales, down 0.8 million bales or 1 percent from last month, but up 4 percent from last season.

- o    United States      Production is estimated at 15.4 million bales, up 0.2 million or 2 percent from last month and up 5 percent from last year. Increased production is due to larger estimated harvested area.
- o    China                Production is estimated at 18.7 million bales, down 0.8 million or 4 percent from last month and last year. Decreased production is estimated due to unfavorable weather during the growing season.
- o    Egypt                 Production is estimated at 1.55 million bales, down 50,000 bales or 3 percent from last month and down 4 percent from last year. The decrease in production is due to lower estimated yield.

Table 1  
U.S. Crop Acreage, Yield, and Production 1/

Commodity	--Harvested Area--			--Yield--				--Production--			
	Prel.	Proj.		Prel.	1988/89 Proj.			Prel.	1988/89 Proj.		
	1986/87	1987/88	1988/89	1986/87	1987/88	Dec.	Jan.	1986/87	1987/88	Dec.	Jan.
	--Million Acres--			--Bushels per Acre--				--Million Bushels--			
All Wheat	60.7	56.0	53.2	34.4	37.7	34.0	34.1	2,092	2,107	1,812	1,811
Winter	43.2	39.3	39.8	35.2	39.8	39.2	39.2	1,521	1,565	1,561	1,561
Other	17.5	16.6	13.4	32.5	32.6	18.6	18.7	570	542	251	250
Rye	0.7	0.7	0.6	28.8	29.0	24.8	24.8	20	20	15	15
Soybeans	58.3	57.0	57.4	33.3	33.7	26.6	26.8	1,940	1,923	1,512	1,539
Corn	69.2	59.2	58.2	119.3	119.4	82.3	84.6	8,250	7,072	4,671	4,921
Sorghum	13.9	10.6	9.1	67.7	69.7	60.6	63.8	938	739	546	578
Barley	12.0	10.1	7.5	50.8	52.7	38.2	38.6	611	530	283	291
Oats	6.9	6.9	5.6	56.3	54.0	39.1	39.1	386	374	211	219
	--Million Hectares--			--Metric Tons per Hectare--				--Millions of Metric Tons--			
Total Feedgrains	41.2	35.1	32.5	6.1	6.1	4.5	4.6	252.3	215.4	141.7	149.2
	--Million Acres--			--Pounds per Acre--				---Million CWT.---			
Rice	2.4	2.3	2.9	5,651	5,555	5,547	5,511	133.4	129.6	158.4	159.5
								---Million 480-Pound---			
All Cotton	8.5	10.0	11.9	552	706	612	623	9.7	14.8	15.2	15.4

Table 2  
U.S. Planted Area of Major Crops

Year	Wheat			Feedgrains								All	
												Total Maj.	
	Winter	Other	Total	Rye	Rice	Corn	Sorghum	Barley	Oats	Total	Soybeans	Cotton	Crops
--Million Acres--													
1986/87	54.0	18.1	72.1	2.4	2.4	76.7	15.3	13.1	14.7	119.8	60.4	10.0	267.0
1987/88 Prel.	48.8	17.0	65.8	2.5	2.4	65.7	11.8	11.0	18.0	106.5	58.0	10.4	245.6
1988/89 Proj.													
December	48.8	16.9	65.7	2.4	2.9	67.5	10.5	9.7	13.9	101.6	58.8	12.2	243.6
January	48.8	16.7	65.5	2.4	2.9	67.6	10.4	9.7	13.9	101.6	58.9	12.5	243.8

1/ Estimates from USDA Agricultural Statistics Board.



Table 4

## Wheat Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	:	---Area---			:	---Yield---				:	---Production---			
	:				:					:				
	:	Prel.		Proj.	:	Prel.		1988/89	Proj.	:	Prel.		1988/89	Proj.
	:	1986/87	1987/88	1988/89	:	1986/87	1987/88	Dec.	Jan.	:	1986/87	1987/88	Dec.	Jan.
<hr/>														
	:	---Million Hectares---			:	---Metric Tons Per Hectare---				:	---Million Metric Tons---			
	:				:					:				
World	:	227.8	219.6	219.3	:	2.33	2.30	2.29	2.29	:	530.2	504.3	502.5	503.2
	:				:					:				
United States	:	24.6	22.6	21.5	:	2.32	2.53	2.29	2.29	:	56.9	57.4	49.3	49.3
	:				:					:				
Total Foreign	:	203.2	197.0	197.8	:	2.33	2.27	2.29	2.30	:	473.3	446.9	453.2	453.9
	:				:					:				
Maj. Foreign Exporters	:	46.1	43.3	42.1	:	2.79	2.75	2.67	2.67	:	128.5	119.0	111.8	112.6
Argentina	:	5.0	4.8	4.5	:	1.79	1.88	1.64	1.64	:	8.9	9.0	7.4	7.4
Australia	:	11.1	9.1	9.3	:	1.45	1.37	1.44	1.48	:	16.1	12.4	13.0	13.8
Canada	:	14.2	13.5	12.9	:	2.20	1.93	1.21	1.21	:	31.4	26.0	15.7	15.7
EC-12	:	15.7	15.9	15.4	:	4.58	4.50	4.91	4.91	:	72.0	71.6	75.8	75.7
	:				:					:				
Major Importers	:	98.1	95.5	98.0	:	2.40	2.36	2.40	2.40	:	235.5	225.3	235.0	234.9
Brazil	:	3.9	3.5	3.5	:	1.44	1.76	1.59	1.59	:	5.6	6.1	5.5	5.5
China	:	29.6	28.8	29.5	:	3.04	3.05	2.97	2.97	:	90.0	87.8	87.5	87.5
Eastern Europe	:	10.5	10.6	10.7	:	3.73	3.77	4.20	4.20	:	39.1	39.8	45.1	45.1
Egypt	:	0.5	0.6	0.6	:	3.80	4.23	4.20	4.20	:	1.9	2.4	2.5	2.5
Other N. Africa */	:	4.6	5.2	4.4	:	1.23	0.96	1.19	1.19	:	5.7	5.0	5.3	5.3
Japan	:	0.2	0.3	0.3	:	3.56	3.19	3.67	3.67	:	0.9	0.9	1.0	1.0
USSR	:	48.7	46.7	49.0	:	1.89	1.78	1.80	1.80	:	92.3	83.3	88.0	88.0
	:				:					:				
Other Foreign	:	59.1	58.2	57.6	:	1.85	1.77	1.85	1.85	:	109.3	102.7	106.4	106.4
India	:	23.0	22.8	22.2	:	2.05	2.00	2.03	2.03	:	47.1	45.6	45.0	45.0
Iran	:	6.3	6.1	6.3	:	1.14	0.98	1.08	1.08	:	7.1	6.0	6.8	6.8
Mexico	:	1.1	0.9	0.8	:	4.19	4.11	4.00	4.00	:	4.5	3.7	3.2	3.2
Non-EC W. Europe	:	1.0	0.9	0.8	:	4.51	4.20	4.63	4.60	:	4.3	4.0	3.7	3.7
Pakistan	:	7.4	7.7	7.3	:	1.89	1.56	1.73	1.73	:	13.9	12.0	12.6	12.6
South Africa	:	1.9	1.7	2.0	:	1.21	1.81	1.76	1.73	:	2.3	3.1	3.5	3.4
Turkey	:	8.7	8.7	8.8	:	1.61	1.49	1.71	1.71	:	14.0	13.0	15.0	15.0
Others	:	9.8	9.3	9.5	:	1.65	1.65	1.74	1.75	:	16.1	15.3	16.6	16.7

\*/ Algeria, Libya, Morocco, and Tunisia.

JANUARY 1989

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 5

## Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel. Proj.			Prel. 1988/89 Proj.				Prel. 1988/89 Proj.			
	1986/87	1987/88	1988/89	1986/87	1987/88	Dec.	Jan.	1986/87	1987/88	Dec.	Jan.
TOTAL COARSE GRAINS 1/ -----	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	337.2	323.1	327.3	2.48	2.45	2.20	2.21	835.8	791.2	712.7	723.3
United States	41.5	35.4	32.8	6.09	6.10	4.44	4.57	252.8	215.9	142.1	149.6
Total Foreign	295.7	287.7	294.5	1.97	2.00	1.96	1.95	583.1	575.4	570.6	573.7
Maj. Foreign Exporters	23.6	23.4	22.4	2.45	2.40	2.35	2.33	57.8	56.1	53.4	52.2
Argentina	4.5	4.4	4.2	2.88	2.98	2.92	2.84	13.0	13.0	12.4	11.9
Australia	4.3	4.6	4.6	1.56	1.48	1.51	1.48	6.8	6.8	7.2	6.8
Canada	7.8	8.0	7.2	3.26	3.21	2.73	2.73	25.5	25.5	19.6	19.6
South Africa	4.9	4.5	4.4	1.61	1.73	2.02	2.02	7.9	7.8	8.9	8.9
Thailand	2.0	2.0	2.1	2.25	1.51	2.55	2.49	4.6	3.0	5.3	5.1
Major Importers	108.5	108.1	106.3	2.67	2.66	2.59	2.59	290.0	287.5	275.4	275.0
Eastern Europe	18.6	18.1	18.5	3.97	3.56	3.35	3.35	73.9	64.6	61.9	61.8
EC-12	19.8	19.1	19.3	4.13	4.32	4.55	4.55	81.7	82.3	88.1	88.0
Other W. Europe	3.4	3.1	3.2	3.63	3.47	3.44	3.36	12.3	10.9	11.1	10.8
Mexico	7.7	7.8	7.8	1.93	1.87	1.89	1.89	14.9	14.5	14.9	14.9
USSR	58.6	59.5	57.0	1.81	1.91	1.72	1.72	105.9	113.7	98.0	98.0
Other Major Import. 2/	0.4	0.5	0.5	3.04	3.13	3.30	3.30	1.3	1.4	1.5	1.5
Other Foreign	163.6	156.2	165.8	1.44	1.48	1.49	1.49	235.3	231.8	241.8	246.4
Brazil	14.0	13.5	13.4	1.95	1.87	1.75	1.76	27.3	25.2	22.6	23.6
China	27.9	28.8	28.0	3.14	3.36	3.28	3.28	87.6	96.8	91.8	91.8
India	39.6	35.8	39.9	0.67	0.64	0.81	0.81	26.6	23.0	32.5	32.5
Indonesia	3.0	2.8	2.8	1.64	1.71	1.79	1.79	5.0	4.8	5.0	5.0
Nigeria	10.2	9.4	10.1	0.84	0.72	0.84	0.84	8.6	6.8	8.5	8.5
Philippines	3.6	3.8	3.8	1.13	1.15	1.16	1.16	4.0	4.3	4.4	4.4
Turkey	4.3	4.3	4.4	2.19	2.17	2.17	2.17	9.4	9.3	9.6	9.6
Others	61.0	57.9	63.4	1.10	1.06	1.12	1.12	66.9	61.6	67.4	71.0
BARLEY -----	80.0	79.4	76.6	2.28	2.28	2.17	2.17	182.8	181.0	166.0	166.4
United States	4.9	4.1	3.0	2.74	2.83	2.06	2.07	13.3	11.5	6.2	6.3
Total Foreign	75.2	75.3	73.5	2.26	2.25	2.17	2.18	169.5	169.5	159.8	160.1
Australia	2.3	2.4	2.3	1.56	1.46	1.48	1.48	3.5	3.5	3.4	3.4
Canada	4.8	5.0	4.1	3.03	2.79	2.44	2.44	14.6	14.0	10.1	10.1
China	3.4	3.5	3.5	1.82	1.80	1.80	1.80	6.1	6.3	6.3	6.3
Eastern Europe	4.5	4.3	4.3	3.77	3.80	3.71	3.74	16.9	16.2	16.1	16.3
EC-12	12.7	12.2	12.3	3.69	3.82	4.12	4.13	46.8	46.6	51.1	51.0
Other W. Europe	1.8	1.7	1.8	3.38	3.10	3.13	3.07	6.2	5.2	5.5	5.4
Turkey	3.2	3.2	3.3	1.97	1.88	1.97	1.97	6.3	6.0	6.5	6.5
USSR	30.0	30.7	28.9	1.80	1.91	1.57	1.57	53.9	58.4	45.5	45.5
Others	12.6	12.4	12.9	1.21	1.06	1.18	1.21	15.2	13.2	15.3	15.6

FOOTNOTES AT END OF TABLE

CONTINUED

JANUARY 1989

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 5 (Continued)

## Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---			
	Prel. 1986/87	Proj. 1987/88	1988/89	Prel. 1986/87	1988/89 Dec.	Proj. Jan.	Prel. 1986/87	1988/89 Dec.	Proj. Jan.		
CORN	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	129.5	124.6	125.6	3.69	3.58	3.10	3.13	477.3	446.3	386.1	392.7
United States	28.0	24.0	23.5	7.49	7.50	5.17	5.31	209.6	179.6	118.7	125.0
Total Foreign	101.5	100.6	102.1	2.64	2.65	2.64	2.62	267.8	266.6	267.4	267.7
Maj. Foreign Exporters	8.7	8.0	7.8	2.37	2.35	2.72	2.66	20.7	18.7	21.5	20.8
Argentina	2.9	2.6	2.5	3.19	3.46	3.33	3.20	9.3	9.0	8.5	8.0
South Africa	4.0	3.6	3.5	1.78	1.93	2.29	2.29	7.2	7.0	8.0	8.0
Thailand	1.8	1.8	1.8	2.37	1.56	2.70	2.64	4.3	2.7	5.0	4.8
Major Importers	22.0	21.9	22.5	4.03	3.78	3.79	3.77	88.9	82.9	85.0	84.8
Eastern Europe	7.6	7.3	7.5	5.13	4.10	3.85	3.82	38.9	29.9	28.7	28.4
EC-12	3.9	3.7	4.0	6.47	6.96	6.87	6.86	25.2	26.0	27.3	27.3
Other W. Europe	0.2	0.2	0.2	8.01	8.07	8.10	8.10	1.9	1.8	1.8	1.8
Mexico	6.0	6.0	6.1	1.67	1.65	1.69	1.69	10.0	9.9	10.3	10.3
USSR	4.2	4.6	4.6	2.96	3.24	3.59	3.59	12.5	14.8	16.5	16.5
Other Maj. Import. 2/	0.1	0.1	0.1	3.91	4.11	4.15	4.15	0.4	0.4	0.5	0.5
Other Foreign	70.7	70.7	71.8	2.24	2.33	2.26	2.26	158.2	165.0	160.9	162.1
Brazil	13.5	13.1	13.0	1.96	1.87	1.76	1.77	26.5	24.5	22.0	23.0
Canada	1.0	1.0	1.0	5.95	7.02	5.47	5.47	5.9	7.0	5.4	5.4
China	19.1	20.2	19.6	3.71	3.95	3.83	3.83	70.9	79.8	75.0	75.0
Egypt	0.8	0.8	0.8	4.73	5.14	5.00	5.00	3.9	4.2	4.1	4.1
India	5.9	5.3	5.9	1.27	1.04	1.34	1.34	7.5	5.5	7.9	7.9
Indonesia	3.0	2.8	2.8	1.64	1.71	1.79	1.79	5.0	4.8	5.0	5.0
Philippines	3.6	3.8	3.8	1.13	1.15	1.16	1.16	4.0	4.3	4.4	4.4
Zimbabwe	1.2	1.3	1.3	0.92	1.60	1.54	1.54	1.1	2.0	2.0	2.0
Others	22.6	22.5	23.6	1.48	1.46	1.50	1.50	33.4	32.9	35.1	35.4
SORGHUM											
World	46.0	41.3	45.2	1.41	1.33	1.28	1.28	64.8	55.1	55.6	57.9
United States	5.6	4.3	3.7	4.25	4.38	3.80	4.00	23.8	18.8	13.9	14.7
Total Foreign	40.4	37.0	41.5	1.01	0.98	1.04	1.04	41.0	36.3	41.7	43.2
Argentina	1.0	1.0	1.0	3.10	3.00	3.00	3.00	3.1	3.0	3.0	3.0
Australia	0.8	0.7	0.7	1.85	1.82	1.98	1.93	1.4	1.4	1.8	1.4
China	1.9	1.9	1.8	2.87	2.91	2.94	2.94	5.4	5.4	5.3	5.3
India	15.6	15.0	16.2	0.57	0.57	0.71	0.71	8.9	8.6	11.5	11.5
Mexico	1.4	1.4	1.4	3.19	2.91	2.91	2.91	4.3	4.0	4.0	4.0
Nigeria	4.5	4.3	4.4	0.80	0.67	0.80	0.80	3.6	2.9	3.5	3.5
South Africa	0.3	0.3	0.3	1.53	1.48	1.82	1.82	0.5	0.5	0.6	0.6
Sudan	4.8	3.0	5.5	0.71	0.43	0.55	0.69	3.4	1.3	2.2	3.8
Thailand	0.2	0.2	0.3	1.26	1.10	1.30	1.40	0.3	0.2	0.3	0.4
Others	9.9	9.2	9.9	1.02	0.98	0.98	0.99	10.1	9.0	9.5	9.8

FOOTNOTES AT END OF TABLE

CONTINUED

JANUARY 1989

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 5 (Continued)

## Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---			
	Prel. Proj.			Prel. 1988/89 Proj.				Prel. 1988/89 Proj.			
	1986/87	1987/88	1988/89	1986/87	1987/88	Dec.	Jan.	1986/87	1987/88	Dec.	Jan.
OATS	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
----											
World	25.0	23.6	23.1	1.90	1.84	1.70	1.69	47.5	43.3	39.0	38.9
United States	2.8	2.8	2.3	2.02	1.94	1.40	1.40	5.6	5.4	3.1	3.2
Total Foreign	22.2	20.8	20.8	1.89	1.82	1.73	1.72	41.9	37.9	35.9	35.7
USSR	13.2	11.8	11.5	1.66	1.57	1.43	1.43	21.9	18.5	16.5	16.5
Maj. Foreign Exporters	3.3	3.5	3.7	2.05	1.96	1.80	1.80	6.7	6.8	6.7	6.7
Argentina	0.4	0.5	0.4	1.00	1.30	1.25	1.25	0.4	0.7	0.5	0.5
Australia	1.1	1.3	1.5	1.39	1.32	1.24	1.24	1.6	1.7	1.8	1.8
Canada	1.3	1.3	1.4	2.53	2.37	2.10	2.10	3.3	3.0	3.0	3.0
Sweden	0.5	0.4	0.4	3.26	3.63	3.25	3.25	1.5	1.4	1.4	1.4
Other Foreign	5.8	5.6	5.6	2.31	2.27	2.27	2.23	13.3	12.6	12.8	12.6
China	0.6	0.6	0.6	1.17	1.20	1.20	1.20	0.7	0.7	0.7	0.7
Eastern Europe	1.5	1.4	1.5	2.75	2.82	2.55	2.56	4.2	4.0	3.8	3.8
East Germany	0.2	0.2	0.2	4.09	4.18	3.68	3.68	0.7	0.7	0.6	0.6
Poland	0.9	0.9	0.9	2.69	2.87	2.48	2.48	2.5	2.5	2.2	2.2
EC-12	1.9	1.8	1.8	2.95	2.99	3.15	3.09	5.6	5.3	5.7	5.6
France	0.3	0.3	0.3	3.27	3.72	3.80	3.80	1.0	1.0	1.0	1.0
West Germany	0.6	0.6	0.6	4.44	4.30	4.42	4.23	2.7	2.4	2.5	2.4
Finland	0.4	0.4	0.4	2.92	2.21	2.57	2.21	1.2	0.8	1.0	0.9
Norway	0.1	0.1	0.1	3.15	3.87	2.98	2.98	0.4	0.5	0.4	0.4
Others	1.2	1.3	1.3	1.04	1.00	1.01	1.01	1.3	1.3	1.3	1.3
RYE											
---											
World	14.8	15.9	15.3	2.10	2.14	2.01	2.01	31.0	34.0	30.8	30.8
United States	0.3	0.3	0.2	1.81	1.82	1.56	1.55	0.5	0.5	0.4	0.4
Total Foreign	14.5	15.6	15.1	2.10	2.15	2.02	2.02	30.5	33.5	30.4	30.5
USSR	8.7	9.7	9.5	1.74	1.86	1.74	1.74	15.2	18.1	16.5	16.5
Maj. Foreign Exporter											
Canada	0.3	0.3	0.2	1.93	1.58	1.05	1.05	0.6	0.5	0.3	0.3
Other Foreign											
Eastern Europe	3.9	4.0	3.9	2.73	2.74	2.52	2.53	10.6	11.0	9.9	9.9
East Germany	0.7	0.7	0.7	3.54	3.47	2.77	2.77	2.4	2.4	1.8	1.8
Poland	2.8	3.0	2.9	2.57	2.63	2.47	2.47	7.3	7.8	7.1	7.1
Czechoslovakia	0.2	0.2	0.2	3.49	3.13	3.42	3.42	0.5	0.5	0.5	0.5
EC-12	1.0	1.0	0.9	3.02	2.91	3.08	3.10	3.0	3.0	2.8	2.9
Denmark	0.1	0.1	0.1	4.55	3.74	4.53	4.53	0.5	0.5	0.4	0.4
West Germany	0.4	0.4	0.4	4.28	3.89	4.17	4.19	1.8	1.6	1.6	1.6
Others	0.5	0.5	0.5	1.83	1.80	1.93	1.90	1.0	1.0	0.9	0.9

1/ Total of barley, corn, sorghum, oats, and rye shown below plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.



Table 7

## Oilseeds Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel. Proj.			Prel. 1988/89 Proj.				Prel. 1988/89 Proj.			
	1986/87	1987/88	1988/89	1986/87	1987/88	Dec.	Jan.	1986/87	1987/88	Dec.	Jan.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SOYBEANS											
-----											
World	51.47	53.88	56.13	1.90	1.91	1.69	1.69	97.90	102.91	94.25	95.01
United States	23.59	23.06	23.22	2.24	2.27	1.79	1.80	52.80	52.33	41.15	41.88
Total Foreign	27.88	30.83	32.91	1.62	1.64	1.62	1.61	45.10	50.58	53.10	53.13
Maj. Foreign Exporters	12.78	14.77	16.50	1.90	1.88	1.88	1.88	24.30	27.70	31.00	31.00
Argentina	3.51	4.26	5.00	1.99	2.32	2.20	2.20	7.00	9.90	11.00	11.00
Brazil	9.27	10.51	11.50	1.87	1.69	1.74	1.74	17.30	17.80	20.00	20.00
Other Foreign	15.10	16.05	16.41	1.38	1.43	1.37	1.35	20.80	22.88	22.10	22.13
Canada	0.38	0.46	0.54	2.50	2.76	2.15	2.15	0.96	1.27	1.15	1.15
China	8.30	8.45	8.30	1.40	1.44	1.33	1.33	11.61	12.18	11.00	11.00
Eastern Europe	0.48	0.53	0.57	1.66	1.31	1.27	1.27	0.81	0.69	0.72	0.72
India	1.39	1.40	1.70	0.60	0.57	0.87	0.76	0.84	0.80	1.30	1.30
Indonesia	0.92	0.95	1.00	0.98	1.00	1.00	1.00	0.90	0.95	1.00	1.00
Mexico	0.34	0.39	0.15	1.94	1.92	2.07	2.07	0.66	0.75	0.30	0.30
Paraguay	0.53	0.62	0.69	1.79	1.79	1.74	1.74	0.95	1.10	1.20	1.20
USSR	0.75	0.78	0.80	0.94	0.91	0.91	0.91	0.70	0.71	0.73	0.73
Others	2.01	2.48	2.67	1.68	1.78	1.77	1.77	3.38	4.43	4.70	4.73
COTTONSEED											
-----											
World	29.91	32.49	34.51	0.91	0.95	0.94	0.93	27.13	30.98	32.36	32.09
United States	3.43	4.06	4.81	1.01	1.29	1.15	1.14	3.45	5.23	5.40	5.49
Total Foreign	26.49	28.43	29.70	0.89	0.91	0.91	0.90	23.68	25.75	26.96	26.60
China	4.31	4.84	5.50	1.40	1.49	1.31	1.26	6.02	7.22	7.23	6.92
India	7.28	7.40	8.00	0.44	0.41	0.44	0.44	3.22	3.05	3.55	3.55
Pakistan	2.51	2.57	2.57	1.05	1.15	1.11	1.11	2.64	2.95	2.85	2.85
USSR	3.48	3.53	3.45	1.40	1.27	1.45	1.45	4.87	4.49	5.02	5.02
Others	8.92	10.09	10.18	0.78	0.80	0.82	0.81	6.93	8.04	8.31	8.25
PEANUTS											
-----											
World	18.39	17.53	19.00	1.11	1.12	1.17	1.15	20.45	19.70	22.05	21.93
United States	0.62	0.63	0.66	2.70	2.62	2.81	2.78	1.68	1.64	1.87	1.82
Total Foreign	17.77	16.90	18.35	1.06	1.07	1.11	1.10	18.77	18.05	20.18	20.11
Brazil	0.14	0.10	0.10	1.37	1.67	1.50	1.50	0.20	0.17	0.15	0.15
China	3.25	3.02	3.03	1.81	2.04	1.91	1.91	5.88	6.17	5.80	5.80
India	7.15	6.20	7.50	0.85	0.77	0.97	0.97	6.06	4.80	7.30	7.30
Senegal	0.81	0.85	0.90	1.04	1.06	1.02	0.82	0.84	0.90	0.80	0.74
South Africa	0.16	0.21	0.22	0.73	1.00	1.00	1.00	0.12	0.21	0.22	0.22
Sudan	0.52	0.55	0.55	0.87	0.73	0.73	0.73	0.45	0.40	0.40	0.40
Others	5.74	5.98	6.05	0.91	0.90	0.91	0.91	5.23	5.41	5.51	5.50

CONTINUED

Table 7 (Continued)

## Oilseeds Area, Yield, and Production: World and Selected Countries and Regions (Continued)

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1988/89	Proj.		Prel.	1988/89	Proj.	
	1986/87	1987/88	1988/89	1986/87	1987/88	Dec.	Jan.	1986/87	1987/88	Dec.	Jan.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
SUNFLOWERSEED											
World	14.12	14.85	15.24	1.36	1.39	1.40	1.40	19.25	20.60	21.28	21.33
United States	0.79	0.72	0.73	1.53	1.65	0.92	1.01	1.21	1.18	0.63	0.74
Total Foreign	13.32	14.13	14.51	1.35	1.37	1.42	1.42	18.04	19.41	20.65	20.60
Argentina	1.80	2.06	2.40	1.39	1.36	1.33	1.29	2.50	2.80	3.20	3.10
China	1.11	0.89	1.00	1.39	1.40	1.45	1.45	1.54	1.24	1.45	1.45
EC-12	2.15	2.32	2.08	1.53	1.70	1.97	1.97	3.28	3.93	4.10	4.10
East Europe	1.33	1.38	1.33	2.15	1.73	1.73	1.78	2.86	2.38	2.31	2.37
USSR	3.85	4.16	4.25	1.37	1.46	1.48	1.48	5.26	6.08	6.30	6.30
Others	3.09	3.34	3.45	0.84	0.90	0.95	0.95	2.60	2.99	3.29	3.27
RAPESEED											
World	14.59	16.17	16.55	1.33	1.42	1.31	1.26	19.46	22.97	21.76	20.82
Total Foreign	14.59	16.17	16.55	1.33	1.42	1.31	1.26	19.46	22.97	21.76	20.82
Canada	2.64	2.67	3.65	1.43	1.44	1.16	1.16	3.79	3.85	4.24	4.24
China	4.92	5.27	4.70	1.20	1.25	1.21	1.00	5.88	6.61	5.70	4.70
EC-12	1.27	1.86	1.85	2.91	3.20	2.85	2.85	3.69	5.95	5.28	5.28
East Europe	0.96	0.92	0.88	2.38	2.34	2.36	2.44	2.28	2.16	2.08	2.15
India	3.73	4.10	4.00	0.71	0.76	0.75	0.75	2.64	3.10	3.00	3.00
Others	1.08	1.35	1.47	1.10	0.97	0.99	0.99	1.19	1.31	1.46	1.45
FLAXSEED											
World	4.33	4.17	4.02	0.62	0.55	0.45	0.44	2.69	2.28	1.80	1.75
United States	0.28	0.19	0.09	1.06	1.01	0.95	0.45	0.29	0.19	0.09	0.04
Total Foreign	4.06	3.98	3.93	0.59	0.52	0.44	0.44	2.40	2.09	1.71	1.71
Argentina	0.75	0.69	0.55	0.83	0.80	0.82	0.82	0.62	0.55	0.45	0.45
Canada	0.76	0.59	0.55	1.36	1.23	0.76	0.76	1.03	0.73	0.41	0.41
India	1.23	1.35	1.35	0.28	0.30	0.30	0.30	0.34	0.40	0.40	0.40
USSR	1.05	1.07	1.20	0.22	0.21	0.22	0.22	0.23	0.23	0.26	0.26
Others	0.28	0.28	0.28	0.63	0.65	0.66	0.66	0.18	0.18	0.19	0.19
MAJOR OILSEEDS TOTAL	132.81	139.09	145.46	1.41	1.43	1.34	1.33	186.89	199.43	193.50	192.93
COPRA	--	--	--	--	--	--	--	4.80	4.34	4.73	4.63
PALM KERNEL	--	--	--	--	--	--	--	2.63	2.69	2.90	2.90
TOTAL OILSEEDS	--	--	--	--	--	--	--	194.31	206.46	201.12	200.46
PALM OIL *	--	--	--	--	--	--	--	8.10	8.58	9.32	9.32

Table 8

## Cotton Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1988/89	Proj.		Prel.	1988/89	Proj.	
	1986/87	1987/88	1988/89	1986/87	1987/88	Dec.	Jan.	1986/87	1987/88	Dec.	Jan.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	29.9	32.3	34.6	513	542	532	528	70.4	80.4	84.3	83.8
United States	3.4	4.1	4.8	618	791	702	699	9.7	14.8	15.2	15.4
Total Foreign	26.5	28.2	29.7	499	507	505	500	60.7	65.7	69.1	68.3
Maj. Foreign Exporters	12.1	12.8	13.5	749	763	754	741	41.5	45.0	46.7	45.9
Australia	0.1	0.2	0.2	1446	1190	1306	1306	1.0	1.3	1.2	1.2
Central America 1/	0.1	0.1	0.1	814	811	873	862	0.4	0.4	0.4	0.4
China	4.3	4.8	5.5	824	876	772	740	16.3	19.5	19.5	18.7
Egypt	0.4	0.4	0.4	909	845	846	819	1.9	1.6	1.6	1.6
Mexico	0.2	0.2	0.3	926	956	1025	1025	0.6	1.0	1.2	1.2
Pakistan	2.5	2.6	2.6	527	573	555	555	6.1	6.8	6.6	6.6
Sudan	0.4	0.3	0.3	468	416	435	435	0.8	0.6	0.6	0.6
Turkey	0.6	0.6	0.7	880	916	910	924	2.4	2.5	3.0	3.0
USSR	3.5	3.5	3.5	762	700	801	801	12.2	11.3	12.7	12.7
Major Importers 2/	0.3	0.3	0.4	930	828	837	837	1.4	1.2	1.6	1.6
Other Foreign	14.1	15.0	15.8	275	281	285	287	17.8	19.4	20.8	20.8
Argentina	0.3	0.5	0.5	318	547	376	376	0.5	1.3	0.8	0.8
Brazil	2.2	2.3	2.4	303	322	315	320	3.0	3.4	3.5	3.5
India	7.3	7.4	8.0	222	207	223	223	7.4	7.0	8.2	8.2
Syria	0.1	0.1	0.2	874	835	910	910	0.6	0.5	0.7	0.7
Others	4.2	4.7	4.8	328	332	343	344	6.3	7.2	7.6	7.6

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

JANUARY 1989

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

Table 9

NOTE: The table below presents a 7-year record of the differences between the Jan. projections and the final estimates. Using world wheat production as an example, changes between Jan. projections and the final estimates have averaged 4.8 million tons (1.0 percent) and ranged from -8.3 to 6.4 million tons. The Jan. projection has been below the final estimate five times and above two times.

## RELIABILITY OF JANUARY PRODUCTION PROJECTIONS

COMMODITY AND REGION	: PROJECTIONS AND FINAL ESTIMATES, 1981/82-87/88 1/						
	: -----DIFFERENCE----- : Lowest -- Highest: BELOW : ABOVE						
	: AVERAGE : AVERAGE : Difference : FINAL : FINAL						
	: PERCENT :	: ---MILLION METRIC TONS---			: NUMBER OF YEARS 2/		
WHEAT	:	:	:	:	:	:	:
WORLD	: 1.0 :	4.8	-8.3	6.4	: 5	2	
U.S.	: 0.1 :	0.0	-0.1	0.1	: 2	1	
FOREIGN	: 1.1 :	4.8	-8.3	6.4	: 5	2	
COARSE GRAINS 3/	:	:	:	:	:	:	:
WORLD	: 0.8 :	6.6	-17.9	8.2	: 3	4	
U.S.	: 0.6 :	1.4	-4.6	1.3	: 4	1	
FOREIGN	: 1.0 :	5.6	-13.3	8.2	: 3	4	
RICE (MILLED)	:	:	:	:	:	:	:
WORLD	: 2.0 :	6.1	-12.6	1.8	: 6	1	
U.S.	: 0.7 :	0.0	0.0	0.2	: 0	2	
FOREIGN	: 2.1 :	6.1	-12.6	1.8	: 6	1	
SOYBEANS	:	:	:	:	:	:	:
WORLD	: 1.8 :	1.6	-2.5	2.9	: 4	3	
U.S.	: 2.0 :	1.1	-1.1	1.8	: 2	5	
FOREIGN	: 4.0 :	1.5	-2.0	1.7	: 5	2	
COTTON	:	: ---MILLION 480-LB. BALES---			:	:	:
WORLD	: 2.1 :	1.7	-5.4	2.5	: 4	2	
U.S.	: 0.9 :	0.1	-0.1	0.3	: 2	4	
FOREIGN	: 2.7 :	1.8	-5.7	2.4	: 4	2	
UNITED STATES	:	: ----MILLION BUSHEL----			:	:	:
=====	:	:	:	:	:	:	:
CORN	: 0.6 :	48	-148	38	: 3	1	
SORGHUM	: 1.2 :	10	-53	14	: 1	2	
BARLEY	: 0.5 :	2	-3	11	: 3	1	
OATS	: 0.1 :	0	-2	0	: 2	0	

1/ The final estimate for 1981/82-1986/87 is defined as the first Nov. estimate following the marketing year and for 1987/88 last month's estimate.

2/ May not total seven if projection was the same as the final estimate.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

JANUARY 1989

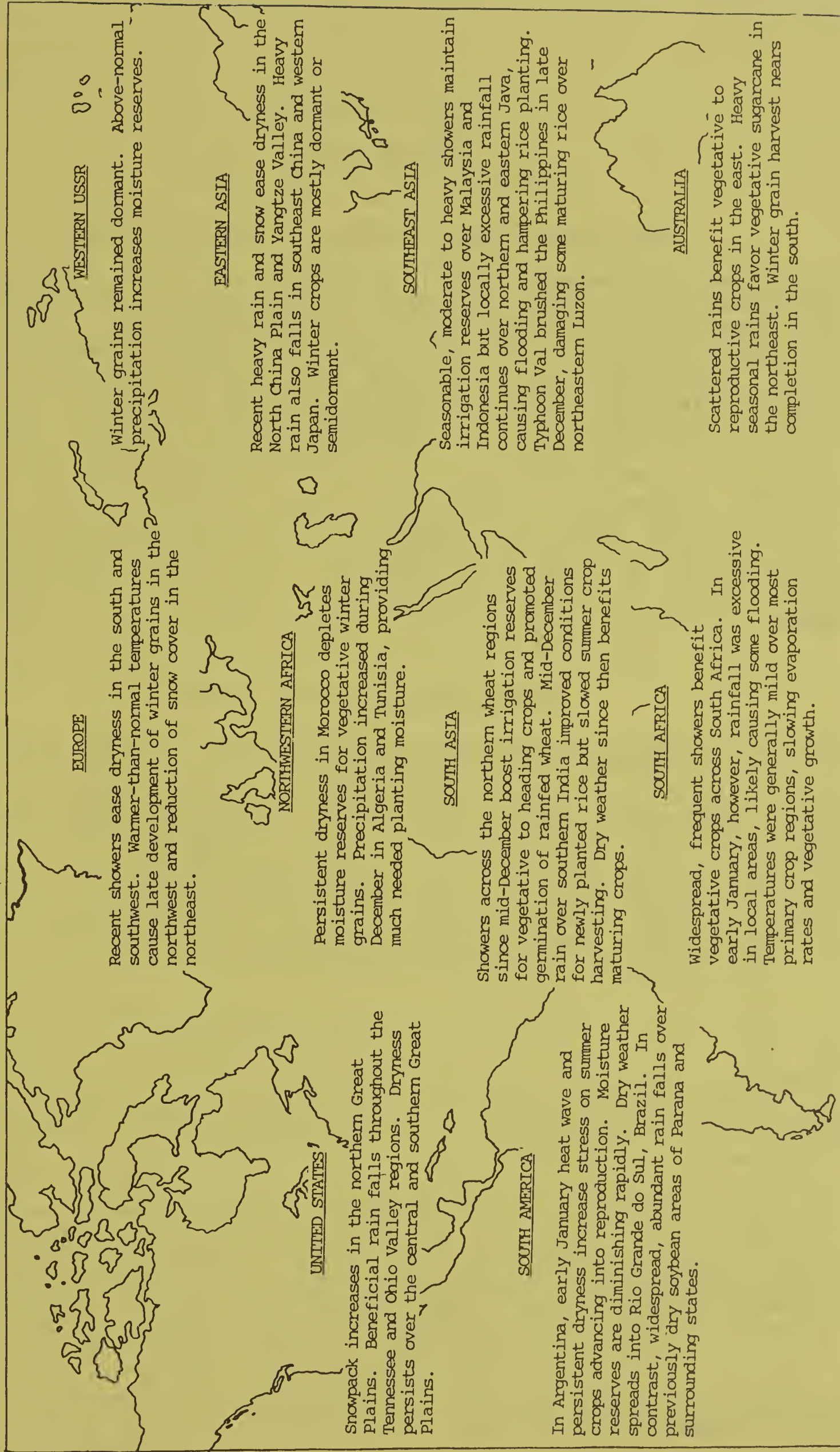
FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

# WORLD AGRICULTURAL WEATHER HIGHLIGHTS

Date

January 13, 1989

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY



(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917).

## WEATHER BRIEFS

### RAIN EASED DRYNESS IN PARTS OF NORTHWESTERN AFRICA

December and early January rainfall eased the dryness in the crop areas of Tunisia and eastern Algeria. Accumulations since early December were slightly below normal but up substantially from October and November. The rain was also timely, falling fairly evenly through the past several weeks. December was dry in the crop areas of Morocco and western Algeria. Morocco received favorable rains through November and still had some soil moisture reserves during December and early January. Moderate showers January 6-8 temporarily eased the unfavorable dryness in most of Morocco, but soil moisture reserves are dwindling. Western Algerian crop areas have received scant rainfall since September. Prospects for winter grains in Morocco, eastern Algeria, and Tunisia currently appear fair to good. However, limited soil moisture reserves in these regions now makes timely rainfall through the rest of the season critical for normal crop development. The prolonged dryness in western Algeria has severely limited the prospects for normal crop development in that region.

### DRYNESS EASED IN SOUTHERN BRAZIL

Widespread showers in late December and early January eased and possibly broke the dryness in Brazil's center-south crop region. The states of Mato Grosso do Sul, Sao Paulo, and Parana benefited from a persistent pattern of scattered showers which brought light to locally heavy rainfall each day. Temperatures remained moderate through the past few weeks, limiting plant stress. The rains may have come too late to save some early planted soybeans, but the vast majority of soybean and corn crops appeared to have benefited. Further south, December and early January rainfall was lighter than normal in Rio Grande do Sul. Soil moisture reserves in that region appear to be marginally adequate, but temperatures have been moderate, limiting crop stress.

### ARGENTINA UNFAVORABLY HOT AND DRY

The principal Argentine crop areas in the states of Cordoba, Santa Fe, Buenos Aires, and La Pampa became unfavorably dry through December and early January. Persistently dry and frequently hot weather stressed crops in these states. Timely showers through mid-December provided crops with adequate soil moisture for early growth stages. The weather became increasingly drier and hotter from late December as crop moisture demands increased. Frequent episodes of hot weather (35 C to over 40 C) lasting one to several days likely caused both severe heat and moisture stress. Corn is the most advanced crop and it appears to have already suffered some permanent loss of yield potential, followed by sorghum, sunflower, and soybean crops. Crops will probably deteriorate further if the present weather pattern persists through January.

## PRODUCTION BRIEFS

### SENEGAL: PEANUT PRODUCTION DECLINES

Peanut production in Senegal for 1988 is estimated at 740,000 tons, a 17 percent drop from last year's near record output. The decline was primarily due to insufficient rainfall throughout the season and below normal fertilizer usage. Although the rains began on time in May, they were inconsistent until July and then ended prematurely in September. Senegal's peanut varieties need at least a 90-day growing season, so this year's precipitation deficit caused premature plant maturation and hampered nut development. In addition to the poor weather, fertilizer consumption declined 81 percent this year, due to reduced credit availability for inputs. The poor weather and lower fertilizer usage resulted in small peanut size.

Although production was below average, planted area was up 7 percent this year. The increased area could be attributed in part to the reduction in support price announced May 1. Since peanut production is the only source of cash earnings for most producers, they increased planted area in order to maintain their income. Peanut acreage is expected to decline next year, due to increased pressure to augment staple crop production, the limited availability of quality peanut seed, and a reduction in acreage in the more risky northern growing area.

### CHINA: COTTON PRODUCTION FAILS TO MEET TARGET

Despite increased economic incentives to cotton farmers such as higher purchase prices and subsidized fertilizer and diesel fuel, the 1988/89 cotton crop failed to meet the production target of 20.7 million bales. Unfavorable weather, which included mid-summer drought in the North China Plain and late-summer flooding in the Yangtze Valley, both major cotton-growing regions, contributed to the shortfall. In addition to unfavorable weather, farmers were hampered by the rapidly rising cost of pesticides, fertilizers, and plastic sheeting which increased cotton production costs. State cotton purchases have dropped sharply from last year because of crop shortages, illegal free market trading and speculation, and the lack of cash to pay the farmers, who are unwilling to accept government vouchers in lieu of cash. The Chinese Government has set its 1989/90 cotton target at 4.5 million tons (20.7 million bales) and plans to raise the state purchase price, but additional incentives may be required to induce farmers to expand cotton production next year.

### PARAGUAY: DRY WEATHER DELAYS SOYBEAN PLANTING

Dry spring weather has delayed soybean planting in Paraguay. Eighty percent of the soybean production is located in Alto Parana and Itapua provinces which are located in southeastern Paraguay. As of December 13, soybean planting was only 55 percent complete in Alto Parana and 75 percent complete in Itapua, compared to 75 and 90 percent normally. Some areas planted in November were later replanted due to poor germination and drought conditions. Beneficial rainfall was reported in most growing areas during the third week of December, allowing planting to resume. Soybeans can be sown through December without a loss in yield potential.

Poor quality seed has reportedly contributed to low germination rates. Due to high international prices at the time of harvest last year, many farmers opted to sell everything to traders. As a result, much of the soybean stock retained for seed was of poor quality. Germination rates as low as 50-55 percent have been reported. Additional seed supplies were imported from Brazilian suppliers.

#### CHINA: GRAIN HARVEST BELOW TARGET

According to China's State Statistical Bureau, the 1988/89 grain harvest (including soybeans and tubers) is estimated at 393.8 million tons, more than 16 million below the production target of 410 million and lower than last year's revised estimate of 403 million tons. This will be the fourth year in a row that production has failed to reach or exceed the record of 407 million tons set in 1984/85. Officials said the drop in production was due to widespread drought and flooding in major growing areas, but limited arable land, low state purchasing prices, and shortages of agricultural inputs also were mentioned as important factors. The government has set its grain target for 1989/90 at 410 million tons. China had planned to produce 450 million tons of grain in 1990 and 500 million tons per year by 2000 in order to keep up with population growth, but these goals now appear unlikely to be met.

#### FRANCE: SPRING FEED PEA AREA TO INCREASE IN 1989

According to a recent joint study by the French Association of Oilseed and Protein Seed Producers and the French Protein Crop Industry Association, the area planted to spring feed peas in France will increase about 11 percent in 1989, to 475,000 hectares. The increase is expected to occur principally in central and west-central regions, namely, Poitou-Charentes (up 19 percent) and Centre (up 16 percent). These are regions where pea production is still relatively recent and limited. However, spring pea production next year is also forecast to rise in the traditional pea-producing Champagne-Ardennes region in north-eastern France. Champagne-Ardennes is the leading French producing region for feed peas, accounting for 26 percent of the nation's spring pea area in 1988. Farmers in Champagne-Ardennes, especially in the Marne department, usually obtain the best yields for this crop in the European Community (EC). Spring pea yields in Marne in 1988 were 6.2 tons per hectare compared to an average 5.4 tons for all of France. The study emphasizes that the regional specialization of pea cultivation will continue in future years due to the EC maximum guaranteed quantity system, which tends to diminish producer support prices and thus favors the most efficient farmers.

Spring peas traditionally make up the bulk of French feed pea production (95 percent in 1988). The relatively strong increase in spring pea cultivation expected in 1989 shows that, despite a 10-percent drop in the EC minimum grower price for this crop (in French francs) in 1988/89 relative to 1987/88, feed peas still remain very profitable compared to most other crops. If spring pea yields in 1989 remain equal to the very good levels of 1988, an 11-percent increase in next year's area will result in a net production rise of about 234,000 tons.

CANADA: INITIAL CROP AREA ESTIMATES FOR 1989

Analysts from Agriculture Canada's Grain Marketing Bureau presented the first formal forecasts of 1989 harvested area for grains and oilseeds at their annual Outlook Conference in mid-December. The following table details those estimates.

Commodity	1988/89	1989/90
	(1,000 Hectares)	
All Wheat	12,921	14,215
Durum	2,286	2,428
Barley	4,134	4,500
Corn	981	1,042
Oats	1,418	1,300
Rye	245	280
Soybeans	529	520
Rapeseed	3,652	3,120
Flaxseed	546	710

The total area planted to wheat is forecast to reach the record 1986/87 level primarily due to higher producer prices. Initial payments will probably be raised this year in view of higher world prices. In addition, the resumption of normal weather would allow virtually all area to be harvested, in contrast to abandonment in excess of 4 percent last year as a result of the drought. The increase in barley area is forecast to come primarily out of rapeseed. Despite strong prices, the strict rotational requirements of rapeseed should limit plantings and boost both barley and wheat area.

## FEATURE COMMODITY ARTICLES

### WORLD COFFEE PRODUCTION

USDA's 93.3 million 60-kilogram-bag estimate of world green coffee production for 1988/89 is down 10 percent from the revised 103.3-million-bag record harvest of a year earlier, largely because of the traditional biennial yield cycle (see chart 1). The estimate is 18 percent more than the 1986/87 crop which, in addition to being an off year in the cycle, included a drought-reduced harvest in Brazil, the world's largest producer. All regions showed increases from the previous year except South America which was down 23 percent (9.8 million bags) from a year ago. Asia, up 16 percent, is estimated to have the largest increase over the 1987/88 crop.

South American production of 42.5 million bags, down 23 percent from last year, accounts for 46 percent of the estimated 1988/89 world total. Brazil harvested a crop of 25.0 million bags in 1988/89, 34 percent or 13 million bags less than last season. Weather conditions were favorable for the development of the 1988/89 crop, but the crop is smaller as yields are always expected to fall following a good year. The quality of coffee harvested is considered to be good. The 1988/89 crop was harvested from a total tree population estimated at slightly more than 4 billion. In Colombia, coffee production in 1988/89 is estimated at 12.7 million bags, down 2 percent from last year's crop that was revised downward to 13.0 million bags. The reduced output is attributed to the biennial cycle. However, reduced subsidies for fertilizers and rust control may adversely affect production for the next season as fertilizer prices were up more than 40 percent in 1988 and further increases are expected in 1989. Colombian growers continue their efforts to control rust as the area affected amounted to 728,000 hectares out of a total coffee area of slightly over 1 million hectares in 1988. Ecuador's coffee production in 1988/89 is estimated at 1.7 million bags, up 2 percent from last year's revised 1.66-million-bag crop. Peru's outturn of coffee for 1988/89 is estimated at 1.3 million bags, 27 percent more than last year. The government of Peru sharply increased the exchange rate for exports, more in line with free market rates. This has discouraged non-registered shipments to neighboring countries and enhances Peru's ability to fill the International Coffee Organization quota. However, future production may be affected by the large price increases for fertilizers, pesticides, and equipment. These higher prices some as much as 10 times higher than a year ago, resulted from the sharp increase in the exchange rate for imports, effective September 1988.

The 1988/89 coffee harvest for North and Central America and the Caribbean, representing 19 percent of the world total, is estimated at 17.4 million bags, up 1 percent from last year's output. In Mexico, the largest producer in this region, production is estimated at 5.1 million bags, 8 percent above a year ago. The increase was attributed to favorable weather in the main producing states of Chiapas, Veracruz, Puebla, and Oaxaca. Moreover, the coffee areas affected by the 1983 frost in states of San Luis Potosi and Hidalgo are now completely recovered. Although input costs have risen dramatically over recent years, coffee production continues to be more profitable than basic crops and tropical fruits. Consequently, coffee planted area continues to increase. Large growers are improving farm management by controlling pests and diseases, increasing tree density and replacing old trees. Mexico has over 200,000 coffee growers, of which 160,000 are on farms smaller than 2.5

hectares with tree densities lower than 750 per hectare. These small producers will face severe economic problems if coffee prices paid to farmers remain depressed. Guatemala's 1988/89 coffee production is estimated at 2.8 million bags, down 7 percent from last year. Damage to the crop resulted from heavy rain in June and an ongoing crop disease in the eastern department of Santa Rosa that kills the roots of the trees. Coffee production estimates in 1988/89 for Costa Rica and Honduras are 2.7 and 1.6 million bags, respectively, up 10 and 13 percent from last year. In El Salvador, 1988/89 coffee production is estimated at 2.1 million bags, 17 percent less than a year ago and continuing a trend that began in 1978/79.

Africa's 1988/89 coffee crop is estimated at 20.4 million bags, up 4 percent from last year and accounts for 22 percent of world production. In Cote d'Ivoire the estimate of 4.4 million bags is up 29 percent from last year. The higher-than-expected outturn is a result of regular and well-distributed rainfall since February 1988. The 1987/88 crop was revised downward to 3.4 million bags from 4.4 million as a result of recent marketing data and ending stock figures. Kenya's 1988/89 crop is estimated at 1.8 million bags, 12 percent less than 1987/88. In Ethiopia and Uganda, coffee production in 1988/89 is estimated at 3.0 million bags for each country. Ethiopia's development plans call for increased coffee production through an expansion of planted area controlled by the state. A total of 10,000 hectares of coffee is currently under development with funding provided by the World Bank. However, replacement of coffee with food crops in some areas under private cultivation is expected to offset the increase in the state sector. Total area in coffee production is estimated at about 320,000 hectares, 85 percent under private cultivation. In Uganda, production may be understated as farmers often find it necessary to hold several years of robusta coffee at their farms. Most Ugandan coffee is grown by small-scale farmers, who have little or no access to pesticides and fertilizers. Production potential is not expected to be realized unless prices paid to farmers for coffee improve. The lack of inputs affects the arabica region more than the robusta.

Asian 1988/89 coffee production is estimated at 11.7 million bags, 16 percent more than last year and accounting for 13 percent of world outturn. Indonesia, the largest producer in this region, is estimated to have a record crop of 6.0 million bags, slightly more than a year earlier when 5.97 million bags were harvested. However, most of the increase in this region occurred in India, where production is estimated at 3.5 million bags, up 1.5 million or 75 percent over last season's drought-ridden crop.

Oceania, the smallest regional producer of coffee, is expected to increase coffee production 20 percent over 1987/88, although it accounts for only 1 percent of the world total.

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Table 10

COFFEE PRODUCTION ESTIMATES BY REGION  
(1,000 60-Kilogram Bags)

Region	1986/87	Revised 1987/88	Estimate 1988/89
North and Central America and the Caribbean	17,478	17,222	17,417
South America	29,999	55,446	42,547
Africa	19,967	19,582	20,420
Asia	10,958	10,038	11,665
Oceania	762	1,048	1,256
Total	79,164	103,336	93,305

Chart 1

# WORLD COFFEE PRODUCTION

1960/61 TO 1988/89

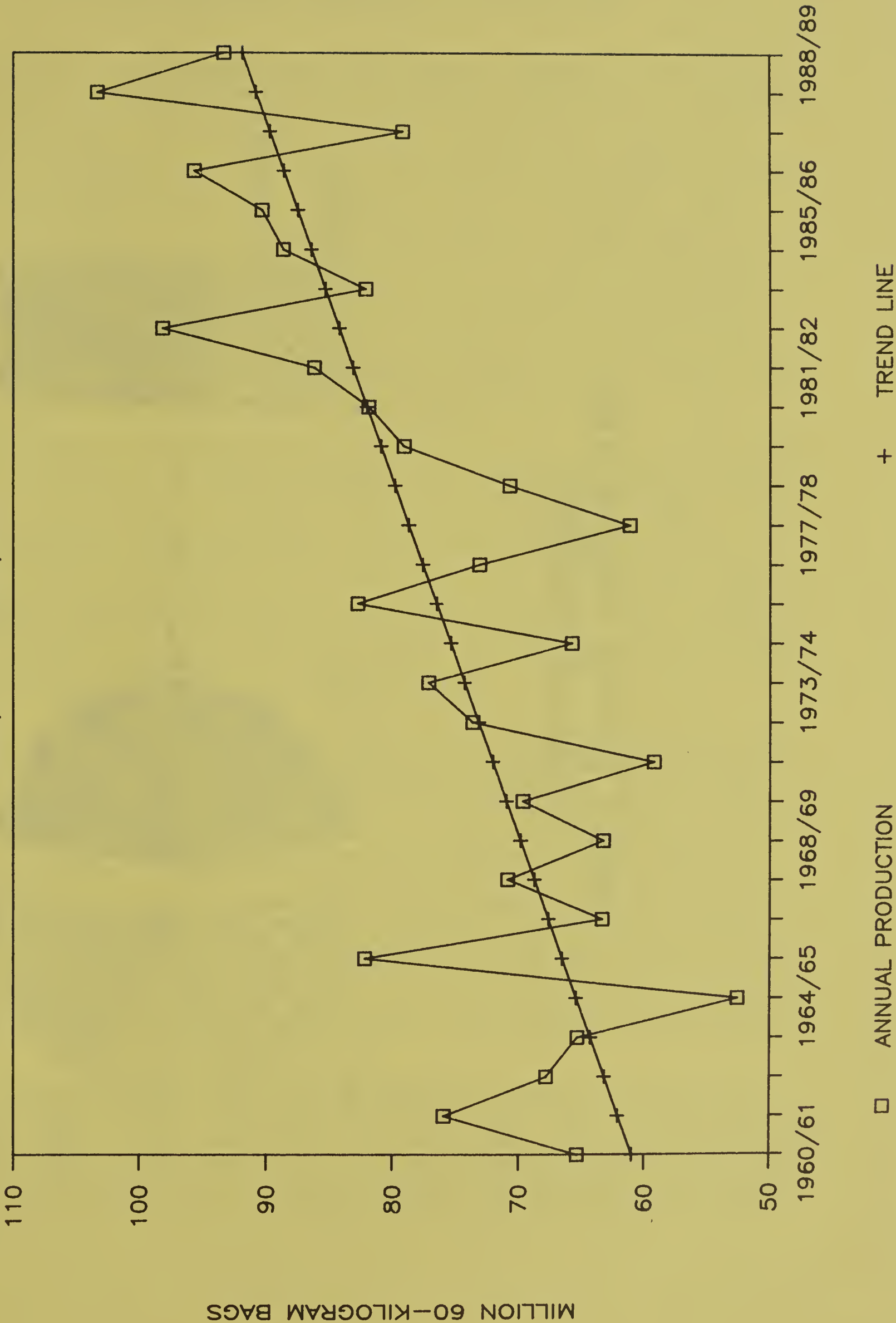


Chart 2

## WORLD COFFEE PRODUCTION (1988/89 SHARES)



## EC-12 SET-ASIDE PROGRAM OFF TO A SLOW START

In February 1988, the European Council endorsed a cropland set-aside plan to complement the crop production stabilizer package implemented for the 1988/89 marketing year. The final regulation was formally adopted by the Council later in the spring. In the words of Council Regulation No. 1094/88, the major aim of the plan is to "... help in reestablishing the balance between output and the market's ability to absorb it," i.e., to help reduce production of those commodities covered under the Common Agricultural Policy (CAP). Set-aside programs in individual member countries were to have been written into national legislation across the EC by July 14. As of late November, however, the EC Commission had approved plans for only seven of the member countries while the other countries affected by the decision (Portugal is excluded from the plan until 1994) were in various stages of planning and implementation. As a result, the Commission issued a statement indicating that it would initiate infringement proceedings against those countries which had not implemented an approved set-aside program by December 31, 1988.

Although EC members must provide cropland set-aside programs, participation on the part of farmers is to remain voluntary. The voluntary nature of the plan and the slowness with which member countries have developed workable programs have led to serious doubts about how well the plan will work in 1989. Only the United Kingdom, the Netherlands, and West Germany implemented their programs in time to have any effect on fall plantings. Furthermore, even assuming effective implementation of individual programs, initial estimates by the Commission suggested that only 1.2 million hectares of arable land, or about 3 percent of the area that the EC planted to field crops covered under the CAP in 1988, would be set aside for 1989. Most of that decrease would be offset by a normal increase in per hectare yields.

The details of individual programs are left largely up to the discretion of each of the member countries, but the Council set-aside regulation does set various requirements and guidelines. Under the regulation, farmers could receive payment by setting aside 20 percent of their arable land for a period of 5 years. In addition, an exemption from all EC "coresponsibility levies" on up to 20 tons of cereals could be earned by setting aside at least 30 percent of the land. Payment levels to farmers are to be set by individual countries, but should be designed solely to compensate the farmer for lost income. The Community will provide up to 50 percent of the first 200 ECU's per hectare per year, 25 percent of payments between 200 and 400 ECU and 15 percent of payments between 400 and 600 ECU's. The EC Commission is also strongly in favor of differential systems of payment which place a premium on the removal of more productive land. Several countries have designed such programs.

One additional provision of the Council regulation allows for grazing or limited pulse and forage production on set-aside land. Where land is used for extensive grazing, or for growing lentils, chick peas, or vetch, payments will be reduced by 40 to 60 percent. Anticipating that this provision could lead to a transfer of land into the livestock sector, the Commission has imposed a limit of one livestock unit per hectare of set-aside land planted with a forage crop.

Following is a summary of individual programs by country, as of early December, 1988:

West Germany	About 170,000 hectares have been set aside. Premiums range from 300-600 ECU's per hectare. Wheat and coarse grains were planted on an estimated 4.74 million hectares in 1988.
United Kingdom	About 60,000 hectares have been set aside. Premiums range from 270-300 ECU's per hectare. Wheat and coarse grains were planted on an estimated 3.93 million hectares in 1988.
Netherlands	About 500 hectares have been set aside. The premium paid is 600 ECU's per hectare. Wheat and coarse grains were planted on an estimated 197,000 hectares in 1988.
Belgium	The plan was announced in late October, but no figures are available on the number of applications received. The premium ranges from 170-420 ECU's per hectare.
France	The plan was announced in mid-November, but no figures on participation are available. The premium ranges from 130-350 ECU's per hectare.
Spain	The plan was announced on December 3. It is expected that about 200,000 hectares will be signed up in 1989. Wheat and coarse grains were grown on an estimated 7.67 million hectares in 1988. The premium ranges from 103-300 ECU's per hectare.
Ireland	The plan was announced in mid-December. The premium is 220 ECU's per hectare.
Luxembourg	A plan has been proposed and is being evaluated by the national parliament.
Italy	A plan has been proposed and is waiting formal approval by the State Council.
Denmark	A plan has been proposed and is being evaluated by the national parliament.
Greece	The plan is in draft form.
Portugal	Portugal is not required to implement a plan until 1994.

Although EC-12 cereal (wheat and coarse grain) area has dropped in the past 10 years, the decrease has been offset by a concurrent increase in the area planted to oilseeds covered under the CAP (see chart 3). Furthermore, the change in cereal area has had only a negligible effect on production. Much of the increased production of both oilseeds and cereals over the past 10 years has come from improved yields. Over the past 10 years, oilseed yields have increased at a rate of about 5 percent annually while cereal yields have increased at about 2-1/2 percent annually (see chart 4). Presented below is an estimate of next year's grain and oilseed production using an optimistic estimate of set-aside area.

Assuming that the Commission's original estimate of 1.2 million hectares would be set aside (from the 1988 level) in 1989 and that yields increase in line with the 10-year trend, one could expect to see the following production levels (the set-aside acreage is removed proportionately from all cereals and oilseeds).

Table 11

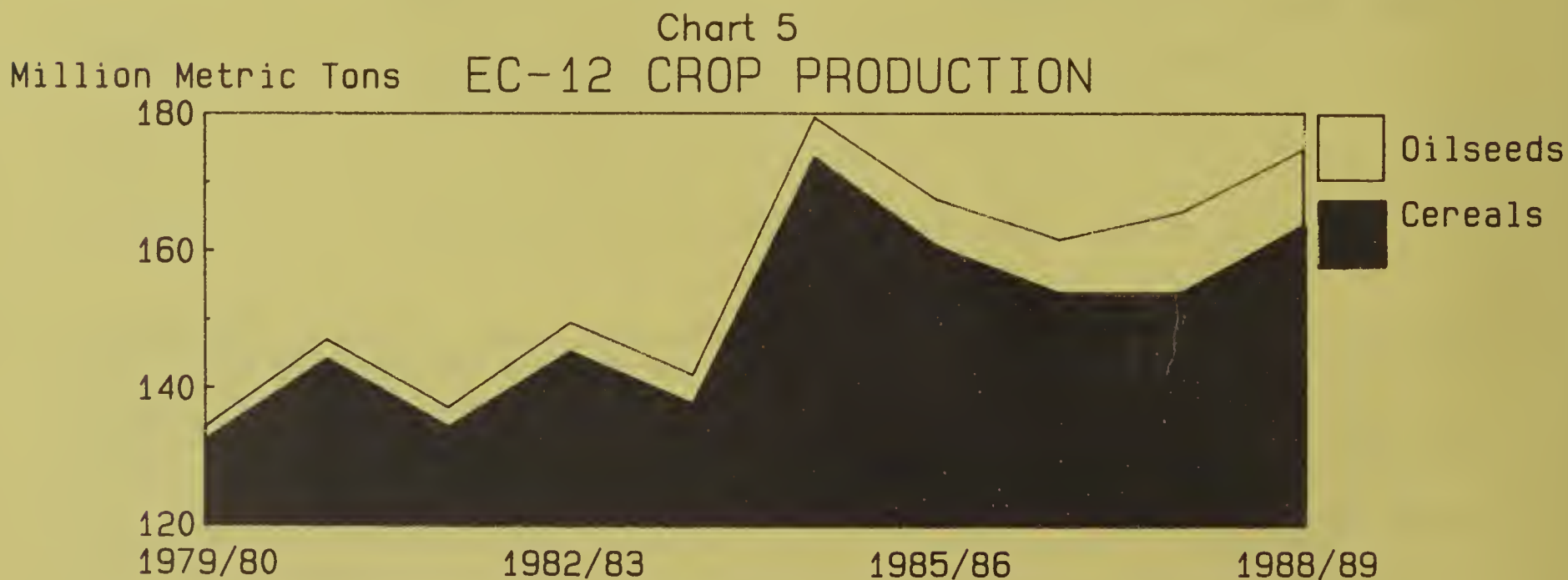
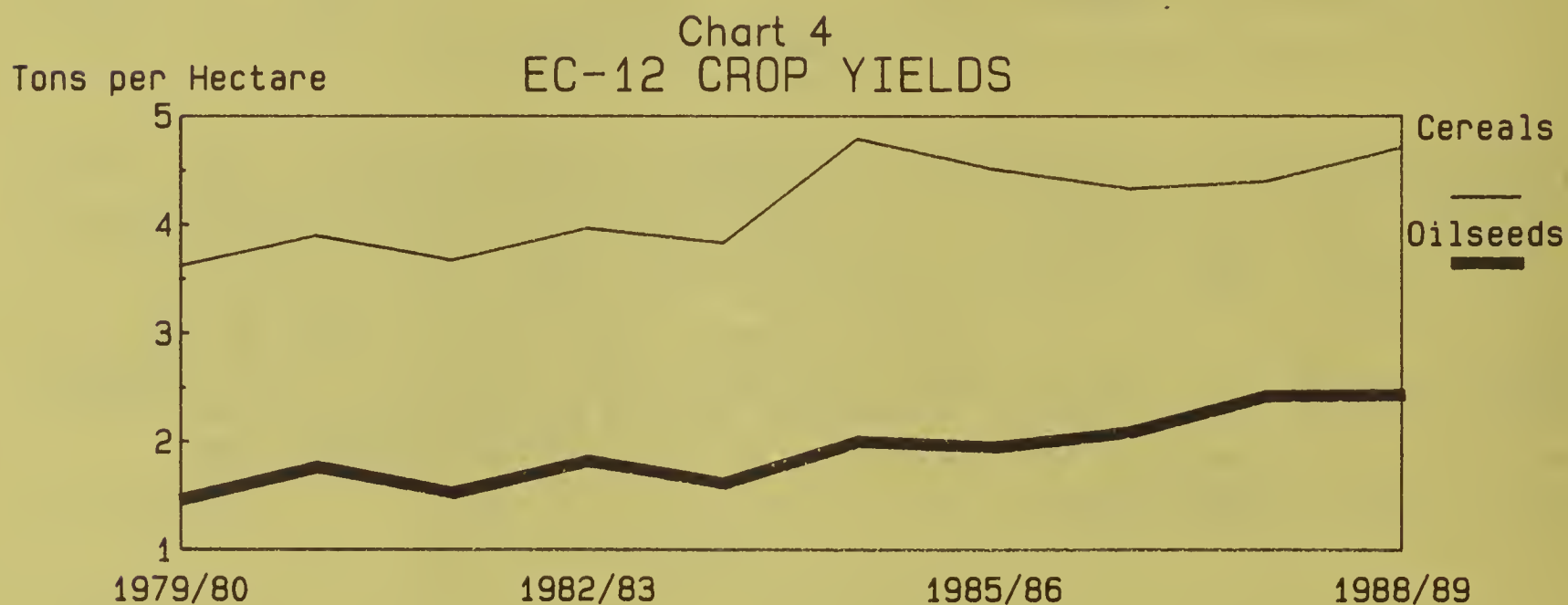
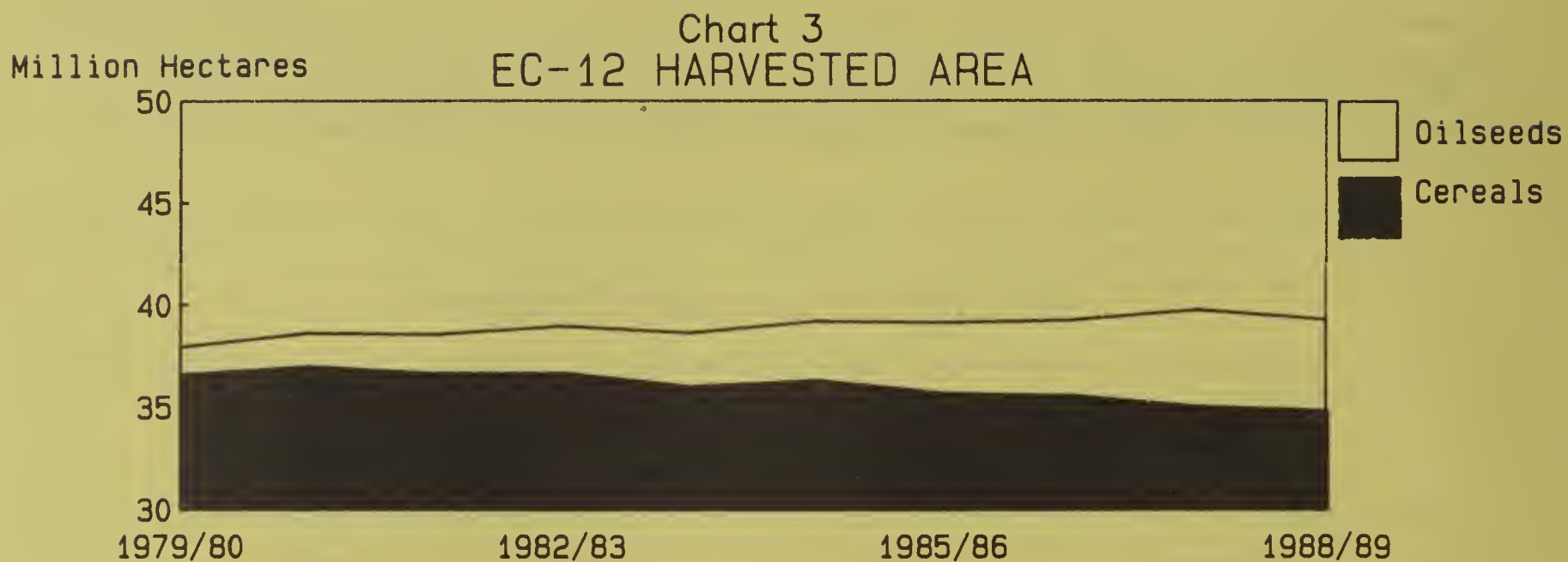
Projected EC Production in 1989/90

	Area (1,000 Ha.)	Yield (Tons/Ha.)	Production (1,000 Tons)
Cereals	33.71	4.81	162.14
Oilseeds	4.37	2.48	10.84
Cereals & Oilseeds	38.08	4.54	172.98

Even if the set-aside plan were fully implemented, leading to a 1.2-million-hectare reduction in the harvested area of cereals and major oilseeds, the anticipated production levels would drop only minimally from the 1988/89 season; when the EC produced an estimated 163.7 million tons of cereals and 11.0 tons of the major oilseeds. If individual countries are reluctant to push forward on program implementation, and only half of the estimated area were to be withdrawn from production, the production of cereals in the EC could be expected to increase by about a million tons and the production of oilseeds could be expected to remain at the 1988/89 level despite the set-aside plan.

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\* Cereals include wheat and all coarse grains.

\*\* Oilseeds includes sunflowerseed, rapeseed, soybeans, and flaxseed.

## TRENDS IN AFRICAN GRAIN PRODUCTION

Total 1988/89 grain production in Africa is estimated at a record 85.0 million tons, up 11.9 million or 16 percent from last year. The major factor responsible for this increase was timely and adequate rainfall in western, central, and eastern Africa that increased coarse grain area and yields. In this article, total grain production is defined as the sum of wheat, coarse grains, and rough (paddy) rice output. Trends in total grain production, since 1979, are presented relative to a base period calculated as the average total grain production from 1974-1978. Representative or major producing countries have been selected within regions for the following discussion, with observations referring to 10-year trends rather than events occurring in the last year or so.

On an absolute basis, total grain production (including wheat, coarse grains, and paddy rice) has risen by roughly a quarter since the mid-1970's. A burgeoning population has, however, caused per capita grain production to fall by about 10 percent in the past decade--from 156.0 kilograms per person in 1974-78 to 140.3 this year. United Nations population projections and 10 and 20 year regression analyses using USDA production data indicate a continued drop in capita production to about 110.0 kilograms by the year 2000 (roughly 70 percent of the mid-1970's average) despite total grain production reaching 92.0 million tons. (The population of Africa has doubled since 1963 and is expected to increase from the present level of approximately 606 million persons to 856 million by the turn of the century.)

Grain production in Africa is faced with many agrometeorological constraints. Sown area and yields hinge on rainfall. There is a variety of climatic regions and the pattern of rainfall in each area predicates both agronomic events and types of grain produced. The central feature of African weather is the intertropical convergence zone (ITCZ) formed at the confluence of cool, moist, northward-moving maritime air with the dry, hot Sahara air masses. The annual north and south movement of the ITCZ, with its wide fluctuations in location, frequency, and amount of precipitation strongly influences local grain yields. Rainfall is seldom "frontal," but usually occurs in the form of thunderstorms, thus creating a "boom-bust" situation in the same local area; many agroclimatological zones experience as much as a 30-percent average departure from mean annual precipitation. In much of West Africa and the Sahel the concept of average rainfall is virtually meaningless. The bulk of African arable land is classified as semi-arid, and farmers must wait for the capricious rains to begin in order to prepare the characteristically poor soils.

The "green revolution" has yet to reach most of Africa. Local agricultural research is in its infancy and most foreign research in plant breeding has emphasized wheat and corn rather than sorghum and millet--the staple crops in much of Africa. Corn is used for human consumption in Africa and there is a strong prejudice against yellow corn. Unfortunately, most improved varieties developed abroad are yellow. Grain production has been negatively affected by a myriad of national agricultural policies that have been based on ideology rather than market economics and local reality. In many instances, there have not been adequate incentives to induce farmers to produce for a national market.

North Africa: Algeria, Egypt, Libya, Morocco, and Tunisia.

Total grain output in this region is estimated at a near-record 19.9 million tons, up 10 percent from last year. Grain production is estimated up 28 percent this year in North Africa relative to the mid-1970's base period. Most of the improvement has come since 1983 due mainly to higher estimated area and yields in Morocco. Annual per capita grain production for the region this year averages 182 kilograms and varies from a high of 340 kilograms in Morocco to a low of 38 in drought-stricken Tunisia.

Planting of the winter grains crops, mainly wheat and barley, coincides with the start of the November-May rainy season. These crops account for more than 90 percent of total grain production. Arable lands tend to be located near the coast and are characterized by highly diversified farms of less than 10 hectares. Durum wheat comprises up to three-quarters of all wheat in the Maghreb countries of Algeria, Morocco, and Tunisia where it is used in the staple meal "couscous." Barley is grown in more southern, drier zones and is mainly utilized as animal feed.

North Africa has tremendous potential to increase production. Dryland farming improvements and reorganization away from parastatal organizations could sharply increase yields, particularly when combined with more efficient rotational schemes.

East Africa: Burundi, Ethiopia, Kenya, Malawi, Rwanda, Somalia, Tanzania, and Uganda.

Total grain output in East Africa for 1988/89 is estimated at 16.4 million tons, up 8 percent from last year due mainly to more favorable weather in Ethiopia and Kenya. Relative to the mid-1970's, regional grain production has risen by 46 percent this year with the greatest 10-year increases in Tanzania, Somalia, and Ethiopia. Regional per capita production has, however, been stagnant at about 120 kilograms per person per year for the past decade due to world-high birth rates.

Ethiopia's 1988 grain crop is estimated at a near-record 5.0 million tons, up 1.5 million tons from the 1984 famine level. Ethiopia has excellent resource potential for increasing grain output despite "collectivization" of agriculture, where even with improved seeds and agricultural chemicals, yields fell below those of traditional farms.

Grain production in Kenya has been stagnant since 1981. In the past decade production increases may be attributed to an expansion of area; presently, the availability of arable land is virtually nil. The greatest problem now is the lack of production incentives to farmers; the one-channel marketing system is grid-locked due to cash-flow problems. Farmers often have to wait several months to be paid for their crop while inflation rates soar. This has the greatest effect on the large, efficient farmers who directly market grain. Subsistence corn producers sell only 5 percent of their corn production off the farm.

Most of the problems discussed for Kenya also are applicable to Tanzania. Farm policies often ignore local reality. Prices and marketing regulations act as disincentives to increasing output. Massive aid programs and the remaining small private coops are responsible for the current production stability in spite of pressure to move all responsibilities to the less efficient and poorly managed parastatal organizations. Infrastructure problems include a collapsing transportation network and crippling unavailability of spare parts for agricultural machinery. The outlook is not good in spite of this country's tremendous agricultural potential.

Sahel/West Africa: Benin, Burkina Faso, Chad, the Gambia, Ghana, Guinea, Guinea-Bissau, Ivory Coast, Liberia, Mali, Mauritania, Niger, Nigeria, Senegal, Sierra Leone, Sudan, and Togo.

Total grain production this year is estimated at a record 26.7 million tons, up 35 percent from 1987/88 due to better rainfall, and therefore greater area and yields for coarse grains. Regional grain output for 1989 is up 32 percent from the 1974-1978 mean; per capita production is, however, down roughly 10 percent. Performance since the mid-1970's among countries in the region varies with the Gambia, Guinea-Bissau, Mauritania, Ghana, and Mali showing significant gains, while grain production in Sierra Leone, Nigeria, and Chad has been relatively stagnant.

This region is mainly in the tropical climatic zone, strongly influenced by the ITCZ and has a growing season extending from May through November. Agricultural resources in both West Africa and the Sahel ("edge of the desert") are extremely meager. In the Sahel, the potential for increasing grain production hinges on better management at all levels, the introduction and acceptance of improved coarse grain varieties and expanded programs to combat the encroachment of the desert into arable areas.

Grain farming in the Sudan centers on sorghum which accounts for about four-fifths of all grain harvested. Recent introduction of improved sorghum varieties could triple output if concomitant infrastructure support could be established. There also are vast areas of uncultivated arable land. Wheat production could be increased, but this crop faces problems of low, government-controlled prices and high winter temperatures.

Nigerian grain production is more highly diversified than in the Sudan, with sorghum, millet, corn, and rice being the main crops grown. The potential for expanding sown area is quite limited. Grain yields are low and could be sharply increased with the use of fertilizers; the drop in world oil prices and foreign exchange earnings has caused the availability and use of agrochemicals to decline.

Central Africa: Angola, Cameroon, Central African Republic, and Zaire.

Grain production for 1989 is estimated at 1.1 million tons, up slightly from last year due mainly to a large increase in Cameroon. Regional grain output has increased by 50 percent since the mid-1970's with Zaire being the strongest performer and Angola the weakest. Regional per capita grain production is virtually unchanged in the past decade, but it must be emphasized that grain consumption is not as important in many of these countries due to the substitution of tropical crops such as cassava.

In Zaire, cereal production is centered on corn and rice. Corn outturn continues to grow, albeit slowly. Rice production is stagnant due mainly to the 1986 abolition of exclusive buying zones reserved for the major rice mills. Millers, who had a monopoly to buy rice within certain geographic areas, formerly supplied farmers with necessary inputs. Millers are now unwilling to extend input packages to growers since they may be outbid at harvest by other buyers. This restriction of inputs together with a deteriorating transportation and communication system are major factors inhibiting grain production.

Southern Africa: Lesotho, Madagascar, Mozambique, South Africa, Swaziland, Zambia, and Zimbabwe.

Grain output this year is estimated at 19.4 million tons, up 10 percent from 1987/88--due mainly to expectations of a better South African corn crop. Regional grain production is up 14 percent this year over the 1974-78 average due to higher expected corn yields in South Africa; regional per capita production is down roughly 30 percent reflecting the general decline in South African corn area. Zimbabwe has shown the largest grain output increases in the last 10 years while Lesotho and Mozambique have seen roughly 30 percent declines.

South Africa is attempting to reduce subsidies to agriculture and to stabilize corn production in line with domestic needs at roughly 6.5 million tons annually. A new land diversion scheme was initiated with the goal of reducing corn area by 1.0 million hectares. This figure may be optimistic; farmers are often unwilling to tie-up their land for the required 8 years. Price policy for maize also has changed; there are no fixed prices, i.e., the price per ton delivered decreases as the size of the total national crop increases. The problems of oversupply, inflation, high interest rates, and recurring drought have induced cash-flow problems for some grain farmers, especially those in more marginal areas such as the western Transvaal.

In Zimbabwe, low corn prices have caused many growers, particularly those in the high-yielding, large-scale commercial sector to reduce corn area. Deliveries of corn to the State Grain Board are likely to be further reduced due to higher retention for stockfeed and other purposes. Current government policy emphasizes the communal sector to the detriment of the highly efficient "large-scale commercial" growers who sell virtually all of their crop to the government. Since the large-scale farmers' primary interest is in tobacco, this sector's corn area has fallen dramatically in the past three years. Corn production will likely meet the goal of self-sufficiency in average to good years, but will not meet national needs during droughts. Wheat is irrigated and yields are quite high with virtually all sown area utilizing high-yielding varieties. Irrigation expansion is a possibility in the Lundi river area and in the Limpopo River valley. Small-scale irrigation expansion is underway through a subsidized credit scheme.

In Zambia, the overvalued kwacha and high government consumer subsidies have reduced producer incentives. Zambia has, however, managed to increase grain production significantly in the past decade due to higher yields. Harvested area has declined during the mid-1970's despite the fact that less than 20 percent of the potentially arable land is cultivated.

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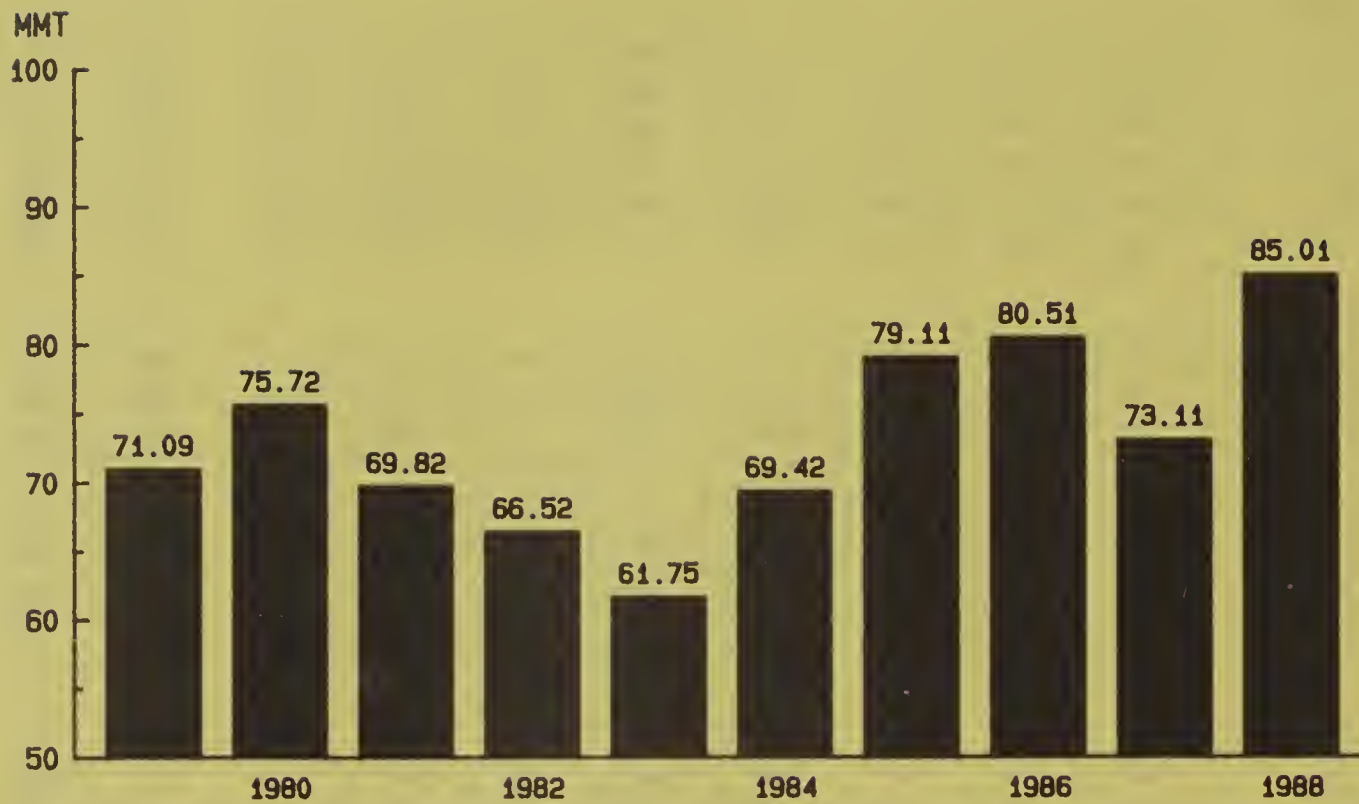
Table 12

Africa: Total Grain Production (1000 Metric Tons)										
YEAR	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988
NORTH AFRICA										
Algeria	1622	2418	2186	1525	1289	3051	3089	2404	2001	1932
Egypt	8061	8161	8162	8518	8689	8563	8615	9335	9704	9490
Libya	210	212	244	231	191	200	200	240	250	215
Morocco	4044	4437	2077	4872	3529	3723	4698	7802	4320	7997
Tunisia	950	1165	1233	1255	922	1024	2067	607	1898	284
Total	14887	16393	13902	16401	14620	16561	18669	20388	18173	19918
EAST AFRICA										
Burundi	265	295	420	309	320	274	320	337	338	338
Ethiopia	4970	4247	4240	5277	4599	3520	4400	5075	4280	5000
Kenya	1976	2296	3186	2923	2562	2073	3331	3433	2743	3354
Malawi	1250	1203	1279	1448	1402	1432	1388	1330	1252	1380
Rwanda	248	262	281	304	328	255	324	342	351	334
Somalia	216	253	372	392	358	475	557	651	565	541
Tanzania	2730	2415	2528	2556	2938	3208	3630	3755	4058	3978
Uganda	1250	1044	1142	1321	1365	1426	1500	1545	1585	1520
Total	12905	12015	13448	14530	13872	12663	15450	16468	15172	16445
SAHEL/WEST AFRICA										
Benin	404	341	358	347	349	472	522	499	402	493
Burkina	1211	1003	1200	1113	1060	1046	1406	1728	1322	1800
Chad	624	648	527	474	489	318	705	730	550	800
Gambia, The	85	69	94	104	58	87	127	143	149	141
Ghana	780	674	725	544	308	912	772	905	997	1232
Guinea	475	488	463	524	510	531	572	621	607	612
Guinea-Bissau	40	31	50	95	78	105	122	120	154	131
Ivory Coast	888	856	841	930	812	1098	1083	1043	1084	1307
Liberia	257	268	245	267	289	298	288	288	298	310
Mali	1172	948	1112	1019	1444	1087	1442	1729	1464	1920
Mauritania	49	34	82	54	33	29	57	119	139	140
Niger	1616	1764	1681	1691	1730	1070	1758	1875	1418	2120
Nigeria	9177	9460	9526	10018	7568	9603	9333	9512	7657	9452
Senegal	664	675	924	772	522	705	1243	758	939	799
Sierra Leone	559	547	533	518	561	497	529	549	567	547
Sudan	3018	2790	3932	2429	2302	1367	4230	4060	1680	4540
Togo	311	290	289	304	289	322	386	333	366	380
Total	21330	20886	22582	21203	18402	19547	24575	25012	19793	26724
CENTRAL AFRICA										
Angola	435	440	328	326	356	336	332	323	297	340
Cameroon	861	901	839	939	862	727	943	910	850	896
Cen. Afr. Rep.	81	87	101	90	80	95	105	113	110	105
Zaire	784	921	971	982	1038	1040	1066	1042	1097	1132
Total	2161	2349	2239	2337	2336	2198	2446	2388	2354	2473
SOUTHERN AFRICA										
Zambia	798	1043	1322	854	1054	1001	1263	1325	1152	1507
Lesotho	228	193	170	123	123	118	167	134	198	155
Madagascar	2161	2236	2132	2218	2279	2272	2318	2383	2285	2355
Mozambique	558	478	505	578	397	441	534	514	403	462
South Africa	13763	16773	11160	6901	6922	11215	10537	10240	10933	12370
Swaziland	71	104	101	58	57	117	92	100	93	82
Zimbabwe	2224	3254	2261	1312	1692	3282	3058	1559	2555	2515
Total	19803	24081	17651	12044	12524	18446	17969	16255	17619	19446
TOTAL AFRICA	71086	75724	69822	66515	61754	69415	79109	80511	73111	85006

Table 13

Africa: Total Grain Production Indices 1974-78 Average = 100										
YEAR	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988
NORTH AFRICA										
Algeria	75	113	102	71	60	142	144	112	93	90
Egypt	102	104	104	108	110	109	109	119	123	121
Libya	92	93	107	101	84	88	88	105	110	92
Morocco	94	103	48	113	82	86	109	181	100	186
Tunisia	96	117	124	126	93	103	208	61	191	29
Total	96	105	89	105	94	106	120	131	117	128
EAST AFRICA										
Burundi	87	97	139	102	106	90	106	111	112	112
Ethiopia	139	119	118	147	128	98	123	142	119	140
Kenya	74	86	119	109	96	78	125	128	103	125
Malawi	104	100	106	120	116	119	115	110	104	114
Rwanda	110	116	125	135	146	113	144	152	156	148
Somalia	90	105	155	163	149	198	232	271	235	225
Tanzania	179	158	165	167	192	210	238	246	266	260
Uganda	82	68	74	86	89	93	98	101	103	99
Total	114	106	119	129	123	112	137	146	134	146
SAHEL/WEST AFRICA										
Benin	123	104	109	105	106	143	159	152	122	150
Burkina	104	87	104	96	91	90	121	149	114	155
Chad	90	94	76	68	71	46	102	105	79	116
Gambia, The	189	153	209	231	129	193	282	318	331	313
Ghana	119	103	110	83	47	139	118	138	152	188
Guinea	97	100	95	107	104	109	117	127	124	125
Guinea-Bissau	82	63	102	194	159	214	249	245	314	267
Ivory Coast	114	110	108	119	104	141	139	134	139	168
Liberia	105	110	100	109	118	122	118	118	122	127
Mali	111	90	105	97	83	103	137	164	139	182
Mauritania	153	106	256	169	103	91	178	372	434	438
Niger	130	142	135	136	139	86	141	150	114	170
Nigeria	100	103	103	109	82	104	101	103	83	103
Senegal	84	86	117	98	66	90	158	96	119	102
Sierra Leone	102	100	97	94	102	91	96	100	103	100
Sudan	113	104	147	91	86	51	158	152	63	170
Togo	131	122	122	128	122	136	163	141	154	160
Total	105	103	112	105	91	97	121	124	98	132
CENTRAL AFRICA										
Angola	87	88	65	65	71	67	66	64	59	68
Cameroon	96	101	94	105	97	81	106	102	95	100
Cen. Afr. Rep.	105	113	131	117	104	123	136	147	143	136
Zaire	107	125	132	133	141	141	145	142	149	154
Total	78	106	101	106	106	100	111	108	107	112
SOUTHERN AFRICA										
Zambia	110	144	182	118	145	138	174	183	159	208
Lesotho	101	86	76	55	55	52	74	60	88	69
Madagascar	103	106	101	105	108	108	110	113	108	112
Mozambique	87	74	78	90	62	68	83	80	62	72
South Africa	122	148	99	61	61	99	93	91	97	109
Swaziland	85	124	120	69	68	139	110	119	111	98
Zimbabwe	113	166	115	67	86	167	156	79	130	128
Total	116	141	103	71	73	108	105	95	103	114
TOTAL AFRICA	106	114	105	100	93	105	119	121	110	128

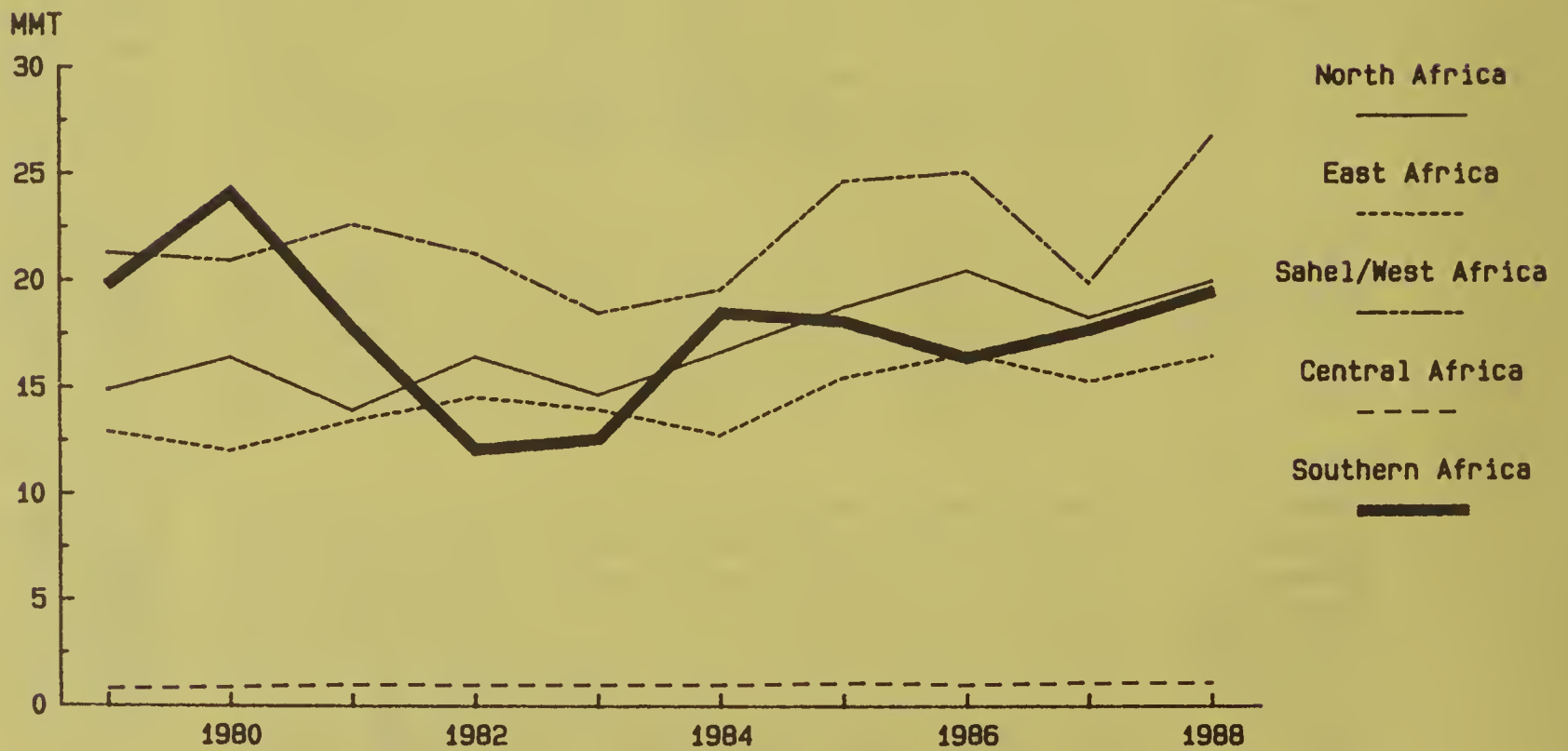
# AFRICA: TOTAL GRAIN PRODUCTION 1979-1988



Total Grain = Wheat, Coarse Grains & Rough Rice

Chart 7

# AFRICA: REGIONAL TOTAL GRAIN PRODUCTION 1979-1988



## TOMATOES FOR PROCESSING DOWN IN 1988

Output of tomatoes for processing in 11 major producing countries is estimated at 14.4 million tons for 1988, slightly below the 1987 level. Preliminary estimates indicate area harvested for 1988 in the 11 countries was down about 2 percent compared to 1987. Most of the decline in area occurred in the European Community. Harvested area in the United States was essentially unchanged from 1987. Production of processing tomatoes in the important Mediterranean basin is estimated to be up about 3 percent rather than 10 percent as was forecast earlier in the year.

In the United States, lower yields offset an increase in area contracted and caused a downturn in production of processing tomatoes. Excessive heat during the summer months and abnormal coolness during late September caused the yield loss. Planted area in Ontario, the leading producing Province in Canada was up 3 percent for 1988. Mexico's 1988 tomato harvest is estimated up slightly, but still below the 1986 record. However, Mexico's elimination of the quota system on tomato plantings in July 1988 and stronger prices for tomato products are expected to cause a significant increase in the 1989 crop which will be harvested during the winter months of 1988/89.

Output of processing tomatoes in Italy is estimated at 2.9 million tons, about 6 percent below the 1987 crop which was reduced by lower plantings, unfavorable weather, and disease problems. Prospects for a larger 1988 crop were bright early in the season, but disease problems and unfavorable weather again hurt both the size and quality of the crop. Final 1988 data on processing tomato production in Greece are expected to show a return to the 1986 production level after declining in 1987 due to unfavorable weather during the growing and harvest seasons. Preliminary estimates of area planted are essentially the same as in 1987.

Spain's production of processing tomatoes, estimated at 760,000 tons, was slightly above 1987 when production was hurt by storms and unseasonably cool weather. Unfavorable spring weather also hurt potential 1988 production, but an increase in plantings and very favorable summer weather allowed the small increase. Output of processing tomatoes in Portugal was expected to be up sharply in 1988 with area up as producers responded to firm prices; however, as in the Spain, rain damage kept the 1988 crop well below its potential. French production of processing tomatoes, estimated to exceed 300,000 tons, was sharply above the reduced levels of 1986 and 1987. With reduced stocks of tomato products, producers and processors were optimistic about chances for profitable production.

Israel's output declined again in 1988 as growers continued to switch to alternative crops which had better profit prospects. Turkey's output of processing tomatoes is estimated to have exceeded 1 million tons in 1988. Minimum contract prices were double those of 1987. Taiwan's 1988 output of processing tomatoes was down sharply as growers continued to shift to other crops. An increase in contract area for the 1989 crop (harvested in the winter of 1988/89) could cause a small production increase.

Table 14

PRODUCTION OF TOMATOES FOR PROCESSING IN SELECTED COUNTRIES  
(1,000 Tons)

Country	1986	1987	1988
United States	6,707	6,892	6,637 <u>1/</u>
Canada	475	477	490
Mexico	300	271	282
Italy	3,240 <u>2/</u>	3,100 <u>3/</u>	2,900
France	242	239	310
Greece	1,149 <u>4/</u>	976 <u>5/</u>	1,156
Spain	618	743	760
Portugal	547	427	452
Turkey	700	900	1,050
Israel	186	177	145
Taiwan	384	278	207
Total	14,548	14,480	14,389

1/ Contract production only, non-contract production accounted for 1.3 percent of total production in 1987.

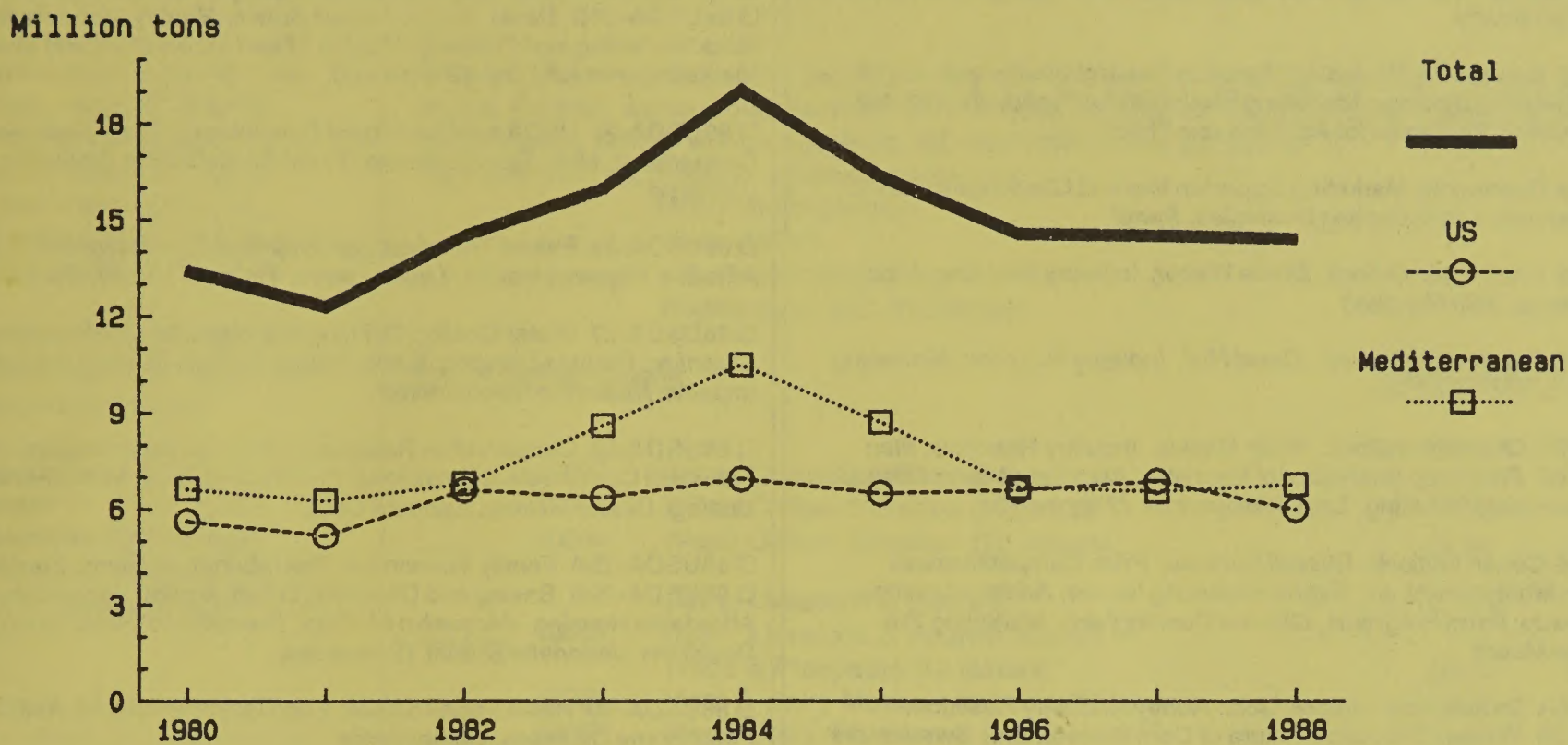
2/ Includes 500,000 tons withdrawn from the market.

3/ Includes 40,000 tons withdrawn from the market.

4/ Includes about 250,000 tons not delivered to processors.

5/ Includes about 30,000 tons withdrawn from the market and 76,000 tons not delivered to processors.

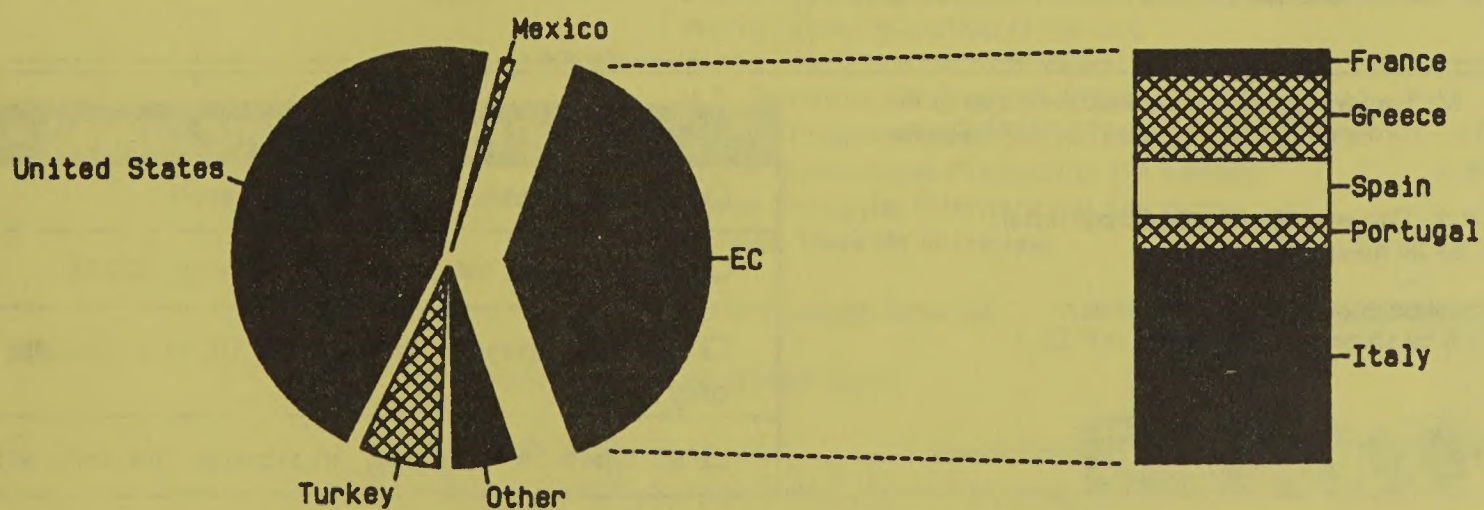
# PRODUCTION OF TOMATOES FOR PROCESSING IN 11 SELECTED COUNTRIES 1980 through 1988



Mediterranean include the EC, Israel, and Turkey

Chart 9

## PROCESSING TOMATO PRODUCTION (1988 Shares)



Other includes Canada, Israel, and Taiwan.

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☐ 88USDA-1B *Angell*, U.S. and World Agricultural Outlook, *Janes Donald*,  
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*Raikes*, Marketing Strategies for Agribusiness Firms

☐ 88USDA-4 Commodity Marketing Opportunities and Challenges, Part 3:  
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☐ 88USDA-5 Food Grain Outlook, *Bruce Weber*, Industry Reaction, Rice  
Marketing Issues, *Milo Hamilton*

☐ 88USDA-6 Feed Grain Outlook, *David Hull*, Industry Reaction, Marketing  
Issues

☐ 88USDA-7A Oilseeds Outlook, *Philip Mackie*, Industry Reaction, *Stan*  
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*Hamm*, Fruit Outlook, *Ben Huang*, Industry Reaction, *Ted Batkin*, Fruit and  
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stock Marketing and Followup: What's Ahead in Livestock and Meat  
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and Stocks, *Ewen Wilson*, Impact on U.S. Policies and Programs, *J.B. Penn*  
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